Adult CASA

Adult Clinic Assessment Software Application

USERS MANUAL

SAFER
·
HEALTHIER
·
PEOPLE™
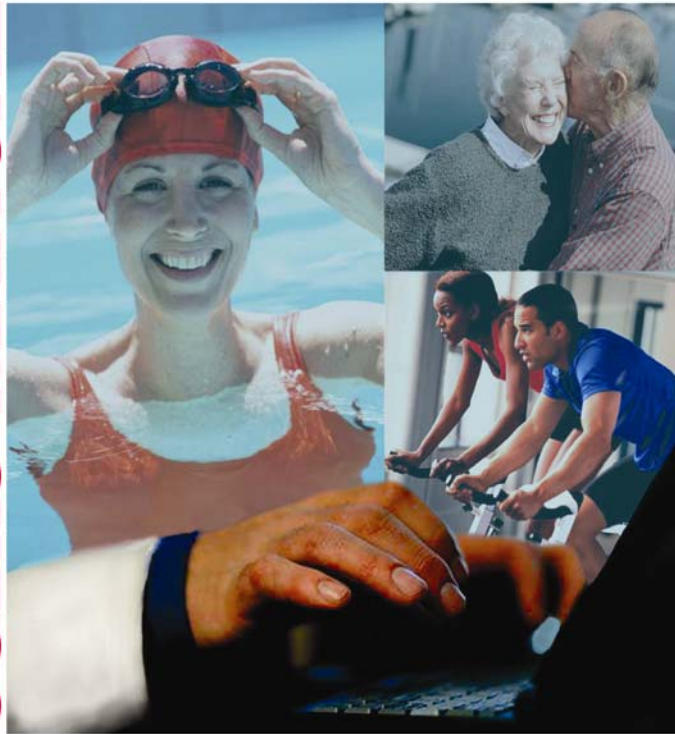
Department of Health and Human Services
Centers for Disease Control and Prevention
National Immunization Program
Immunization Services Division
Health Services Research and Evaluation Branch

CDC
Immunization

INTRODUCTION

Dear Colleague,

Welcome to the Adult Clinical Assessment Software Application (ACASA) Version 3.0.1. The National Immunization Program of the Centers for Disease Control and Prevention is proud to introduce the ACASA program to facilitate obtaining immunization data on adults.

This user's manual provides you with step-by-step instructions on how to use ACASA.

If you have software-related problems with ACASA, or questions regarding updates from a previous version, contact the ACASA help desk at acasainfo@cdc.gov).

Any other questions you have should be directed to the National Immunization program at 404-639-8921.

We hope you enjoy the program!

Sincerely,

Abigail Shefer
Abigail Shefer, MD
CDC/NIP/ISD/HSREB Branch Chief

Carolyn Bachino
Carolyn Bachino, MPH
ASPH/CDC Research Fellow

TABLE OF CONTENTS

1. Instructions for Installation and set-up

❖ *Note: Before using the software, it is important to <u>ensure that you have selected a printer from your computer's control panel</u>. If you are unsure how to do this, ask your computer help desk. To check, from your computer's desktop, double-click on "My Computer". Then double-click on "Control Panel". Then click on "Printers". If no printer appears in this location, you need to add a printer. You may not be able to print any reports until you have added a printer.*

❖ *If you are installing from a CD, <u>be sure your computer has a CD-Rom drive</u>. Otherwise you will not be able to install the CD. Ask your computer help desk to download the installation files onto floppy disks; then use the floppy disks to install the software. Otherwise, you can download the software from the ACASA website at <u>http://www.cdc.gov/nip/casa/acasa/acasa.htm</u>. If you are installing ACASA from the website, once you have completed the software registration form and clicked on the **Download ACASA** link, skip to #3 below.*

❖ *If you are upgrading from a previous version of ACASA and you have collected assessment data using that previous version, **PLEASE BACKUP YOUR DATA** prior to uninstalling your current version of ACASA, and contact the ACASA helpdesk at <u>acasainfo@cdc.gov</u> for assistance. Let them know the version number and release date of the version you used to collect your data and ask if your data will be able to be read by version 3.0.1. Wait for a confirmation message prior to uninstalling your current version.*

1. Insert the ACASA CD-Rom into your computer's CD-Rom drive. Go to **MY COMPUTER** and select the appropriate **CD-Rom** drive (usually D or E).
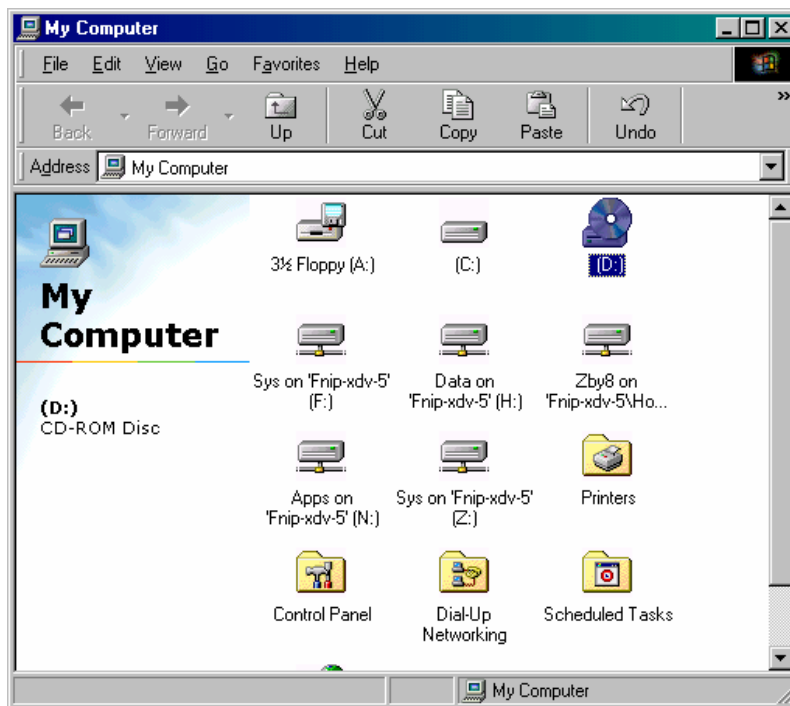
2.   Select **ACASAv301.exe**.
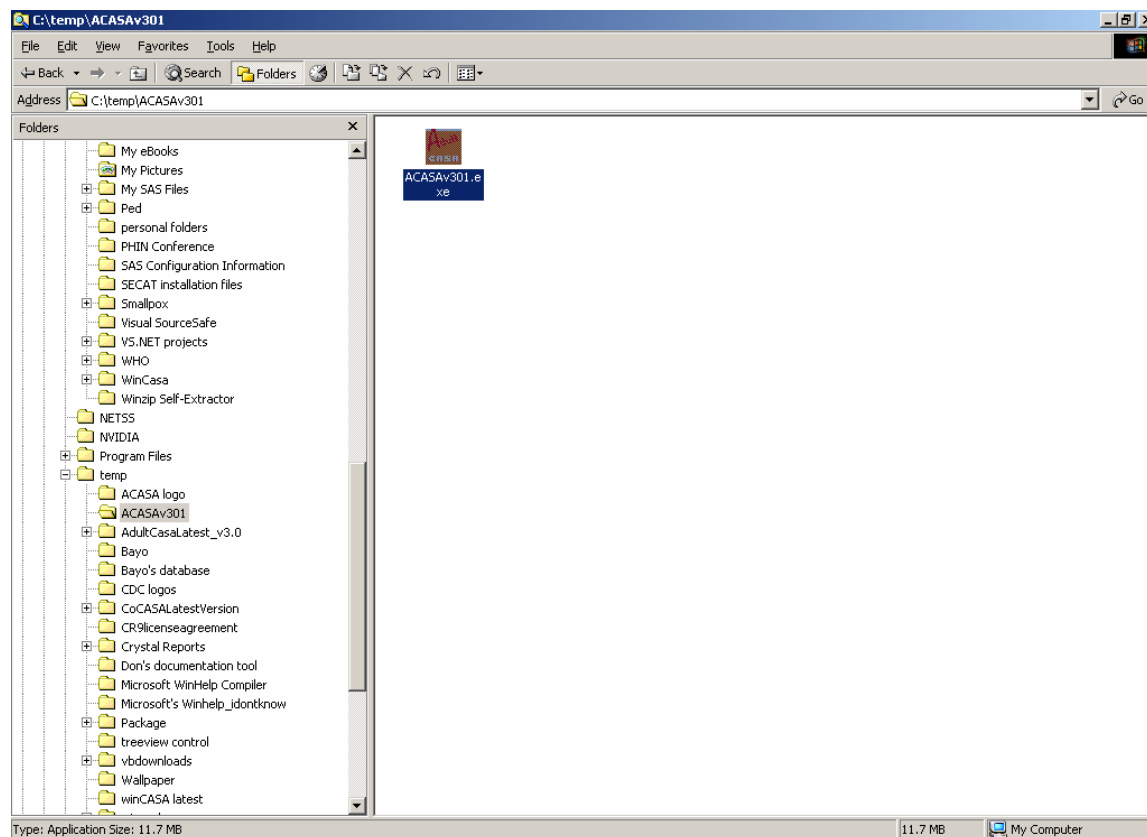
❖ *Note: Some older CD-ROM drives will not read CD-Rs, especially if there are burned at a high speed. If this is the case with your computer, you will not see the file shown above <u>and you will not be able to install ACASA 3.0.1 from a CD</u>. Consider upgrading to a newer CD-Rom drive or*

*requesting ACASA be sent to you in diskette format.
Otherwise, you may download the software from the ACASA
website at http://www.cdc.gov/nip/casa/acasa/acasa.htm.*

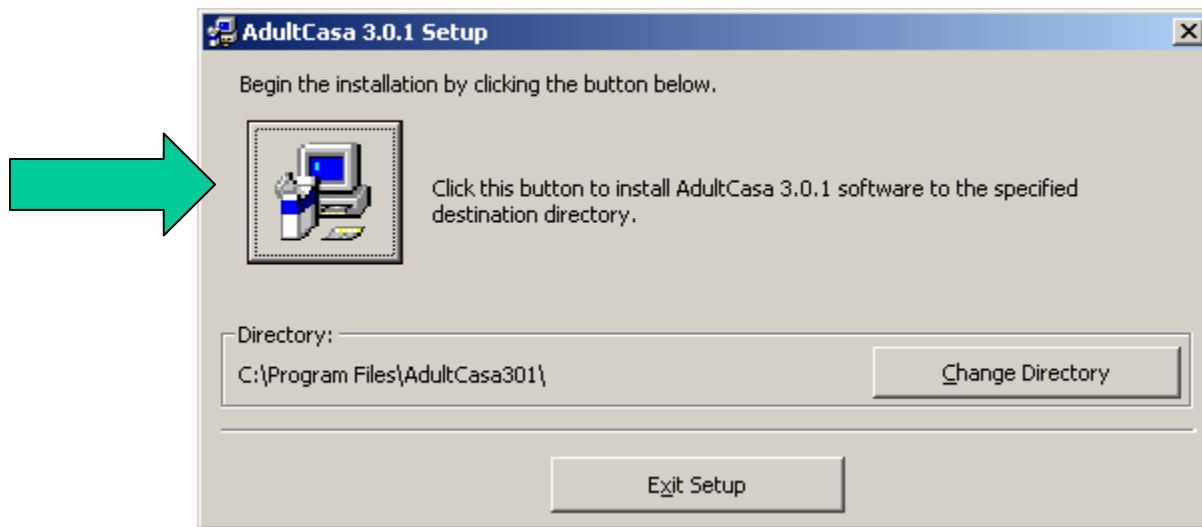Next you will get a screen that looks like this:
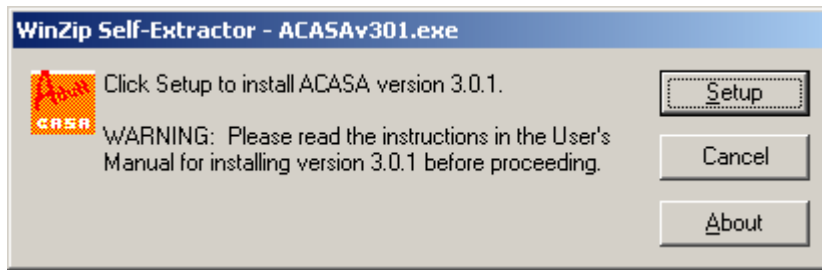
**If you have data that was collected using a version earlier than
version 2.2 (release date November 22nd, 2002),** your data will not
import into version 3.0.1.

If you have data that was collected using **any** previous version,
PLEASE BACKUP YOUR DATA contact the ACASA helpdesk at
acasainfo@cdc.gov for assistance. Let them know the version
number and release data of the version you used to collect your
data and ask if your data will be able to be read by version
3.0.1. **Wait for a confirmation message prior to uninstalling
your current version.**

3.   Click **SETUP**.

4.   At the AdultCasa Setup screen, click **OK**.
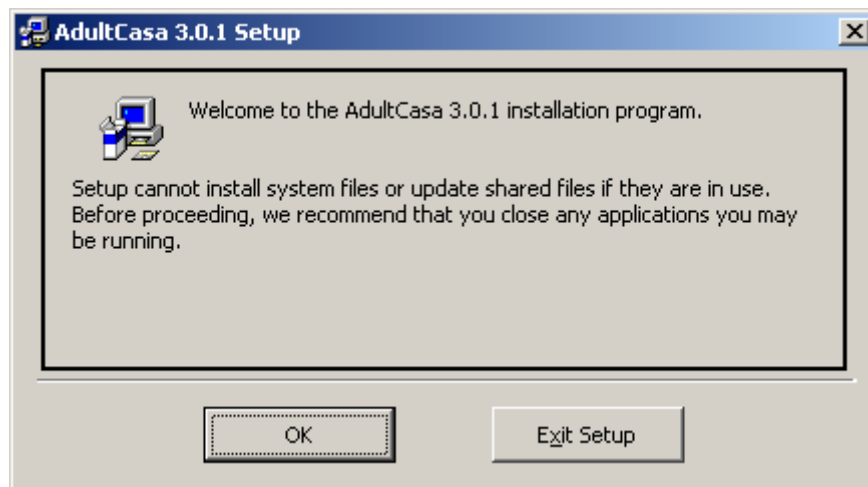
❖ *Note: If at any time during the installation process, you
get an error message stating that your computer needs to be
shut down in order for the installation to take place, do
not panic. This does not mean that your computer is
incompatible with the software. Simply restart your
computer and continue with the installation process.* Next,
you will get another AdultCASA setup screen that looks like
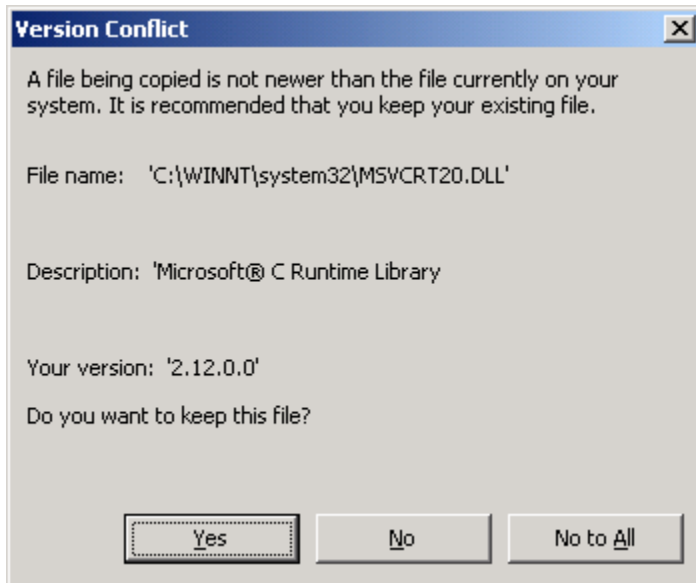this:

4. Click on the picture of the computer.

Next you will get a screen titled **Adult-CASA 3.0.1-Choose Program Group**.
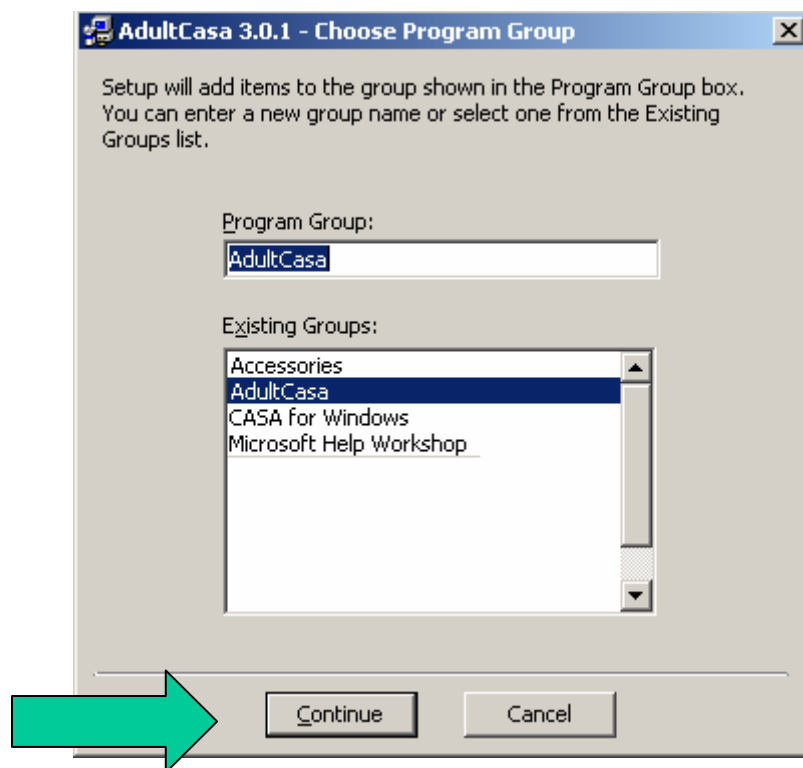
5. Click **CONTINUE**. The program will install within a few seconds.

During the installation process, you may get a message that looks like this:

This message informs you that a file that is currently on your computer may be more current than one of the ACASA components you are installing. By clicking **YES**, you will keep the current file and continue the installation process.

This is what you will see while the program is installing:
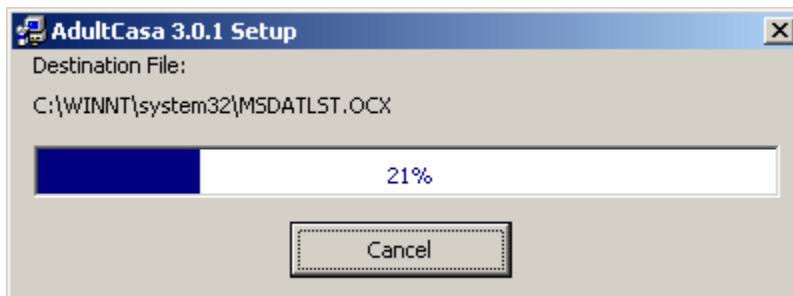
6. If installed properly, you will get a message that looks like this:
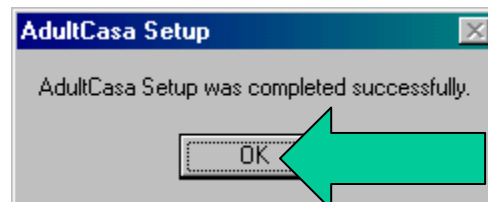
7. Click **OK**. **AdultCASA 3.0.1** will now appear in the programs list of your computer's MS Windows™ Start menu, or as an icon on your desktop.

When you start the program, a title page will appear.

8. Select **BEGIN**. This will bring you to the main menu.

ACASA MAIN MENU

2.   Customizing your information-gathering

1.   From the main menu, select the drop down menu titled
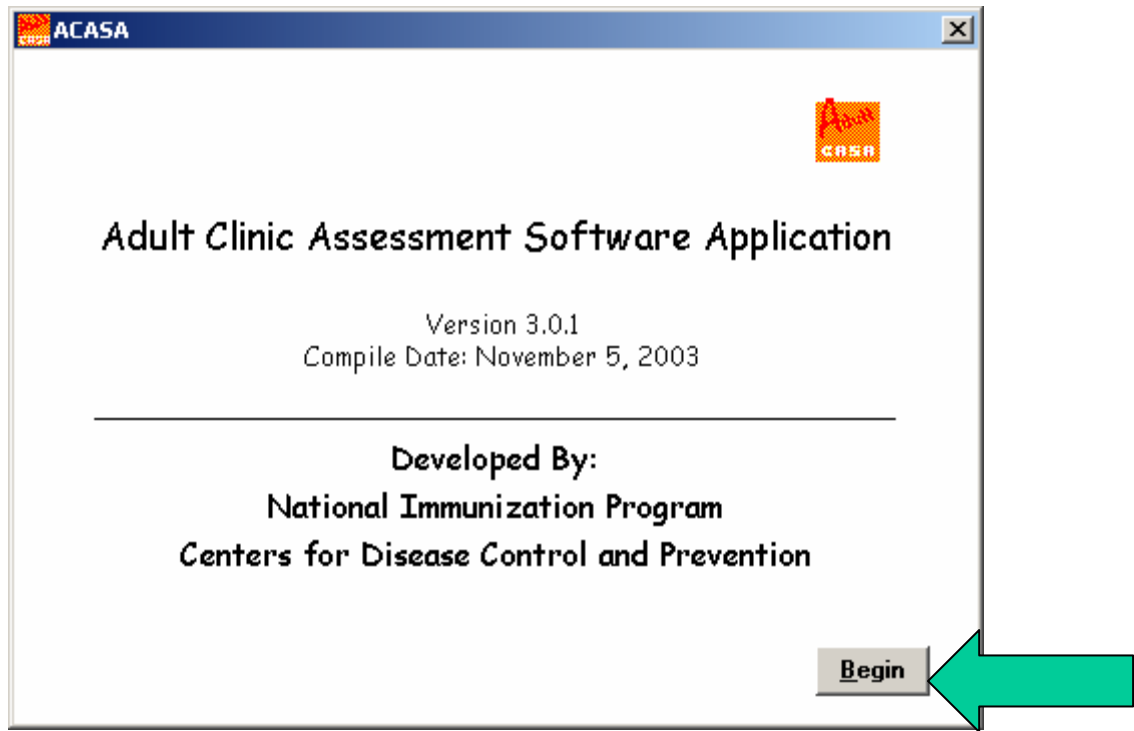   **PATIENT**.   Then select **CUSTOMIZE PATIENT DATA ENTRY SCREEN**.
     You will get a screen that looks like this:

2. To select all entries put your cursor over the box next to "Select all Entries" and click on it.

3. Then click "Save"

4.   If you don't want to select all entries (for instance, you
     don't want personal identifiers to be recorded during data
     entry and reporting), then just deselect the items you want
     to block out. Do this by placing your cursor over the
     square to the left of each item and clicking on it to make
     the check mark disappear.

5.   Select the minimum age (in years) of patients you will be
     entering data on by typing in the age in the blank given
     next to "Please select minimum age (in years):".   The lowest
     acceptable age is 9. If you put in an age less than 9
     years, you will get an error message like this:

6.   When you are through customizing, click **SAVE**.   You will get
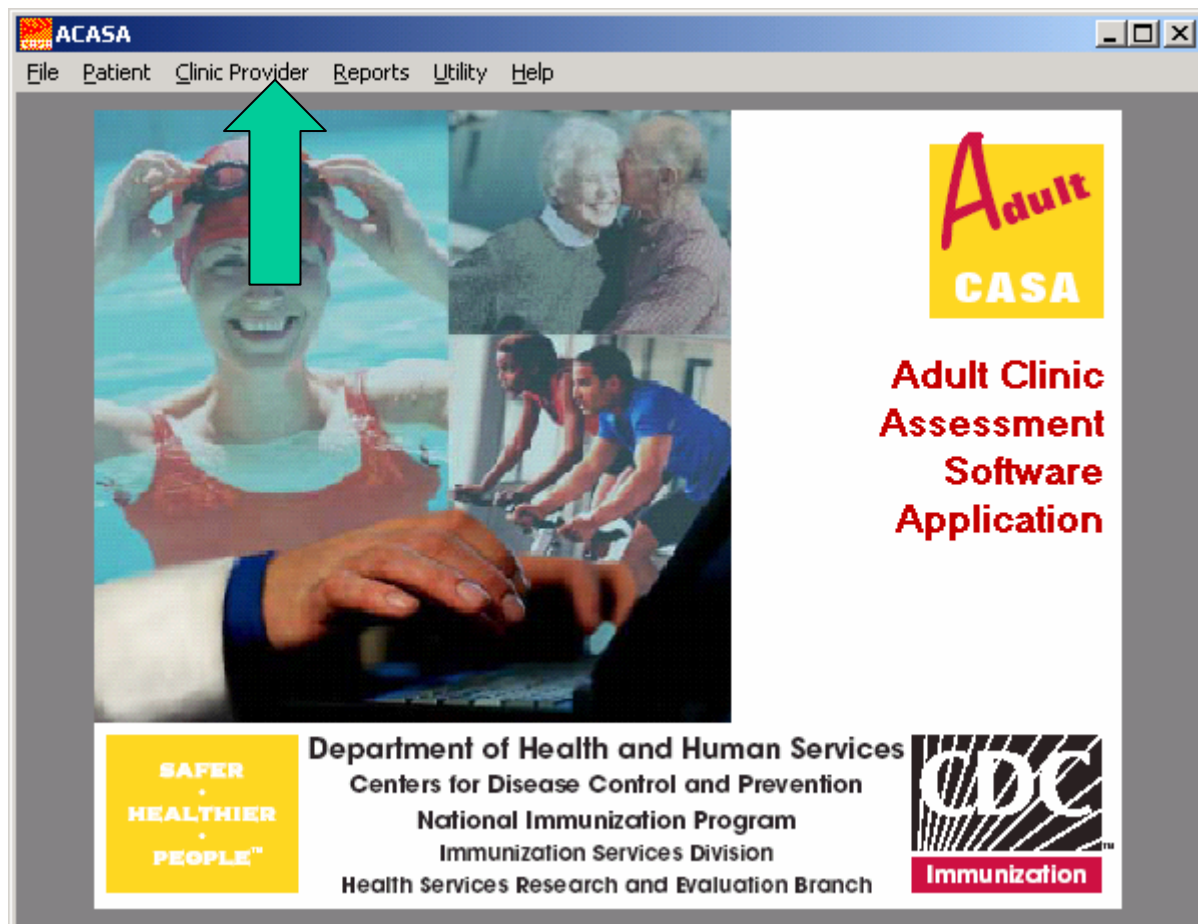   a confirmation message.
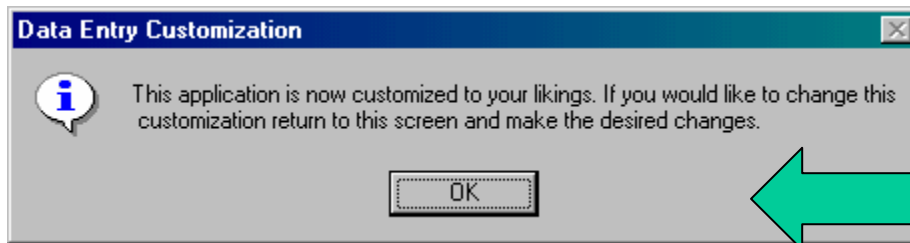
7. Click **OK** to save your customization settings and go back to the main menu.
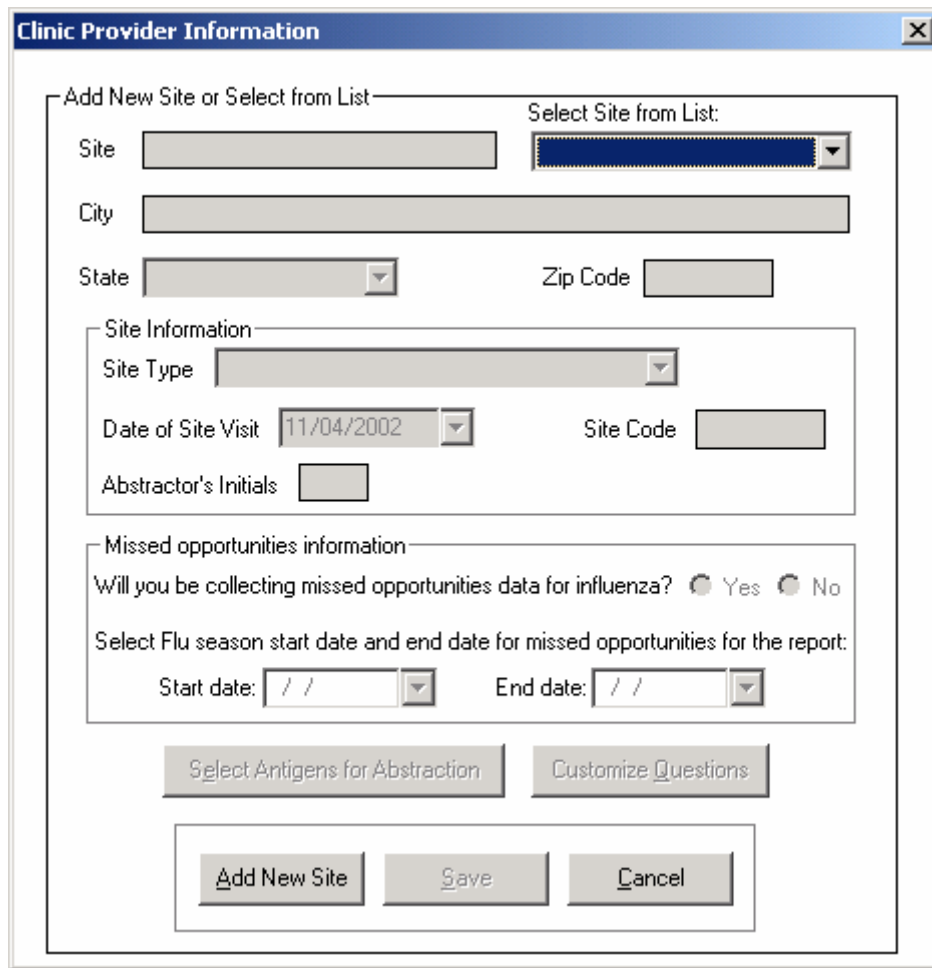
The application is now customized.

3. Entering a new clinic site

1. From the main menu, select the **CLINIC PROVIDER** drop down menu.

2. Select **ADD/UPDATE CLINIC PROVIDER**. You will get a screen called **Clinic Provider Information**.

From this screen, you can either add a new provider site or edit an existing site. To edit an existing site, go to the section in this manual titled Editing Clinic Provider Information.

3. At the bottom of the screen, click on **ADD NEW SITE**.

4. Proceed to put in the site name, city, state, and zip code. Select the site type from the drop down menu, and enter the date of site visit (date format: xx/xx/xxxx) or today's date as appropriate. To select today's date, click on the down arrow next to "Date of Site Visit". You will get a calendar that looks like this:

Click on **TODAY**, and the current date will be selected.

5. Enter your initials (xyz) where it says "Abstractor's Initials".

11

6. Next you will need to tell the system whether or not you will be collecting missed opportunities data (i.e. visits where a patient came in to see the doctor but did not get a flu shot) about influenza. If you are collecting this type of data, click the circle to the left of "Yes". If not, click "No" and skip step #7 below.

You have the option of determining your own definition of the length of the flu season or time period you are recording for, and of deciding which influenza season you want the report to show missed opportunities for (e.g. 2000-01 or 2001-02 season).

7. Enter the start and end dates for the influenza season or time period in question by typing them in, or using the drop-down calendars next to "Start date:" and "End date:". (A flu season typically runs from Oct. 1st of the first year through February 28th of the following year.)

8. Click on "Select Antigens for Abstraction" to select the antigens you will be abstracting for during the chart review.

You will see a screen that looks like this:

Important! - **Only the coverage rates for the antigens you select will be calculated in the reports.** **The reports will not show coverage for vaccines not checked here.**

10. After you have selected the antigens you want, click **SAVE**. This brings you back to the **Clinic Provider Information** screen.

❖ *Note: If you want to add additional questions for ACASA to ask about during the chart review, skip down to section 5 in this user's manual* *Adding Additional Questions*.

11. Once you are through entering the site information, select **SAVE** at the bottom of the page. You will get the following message:
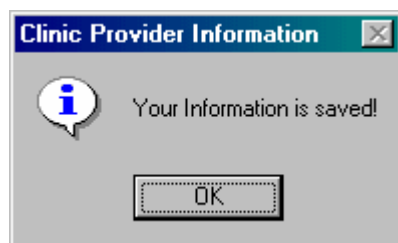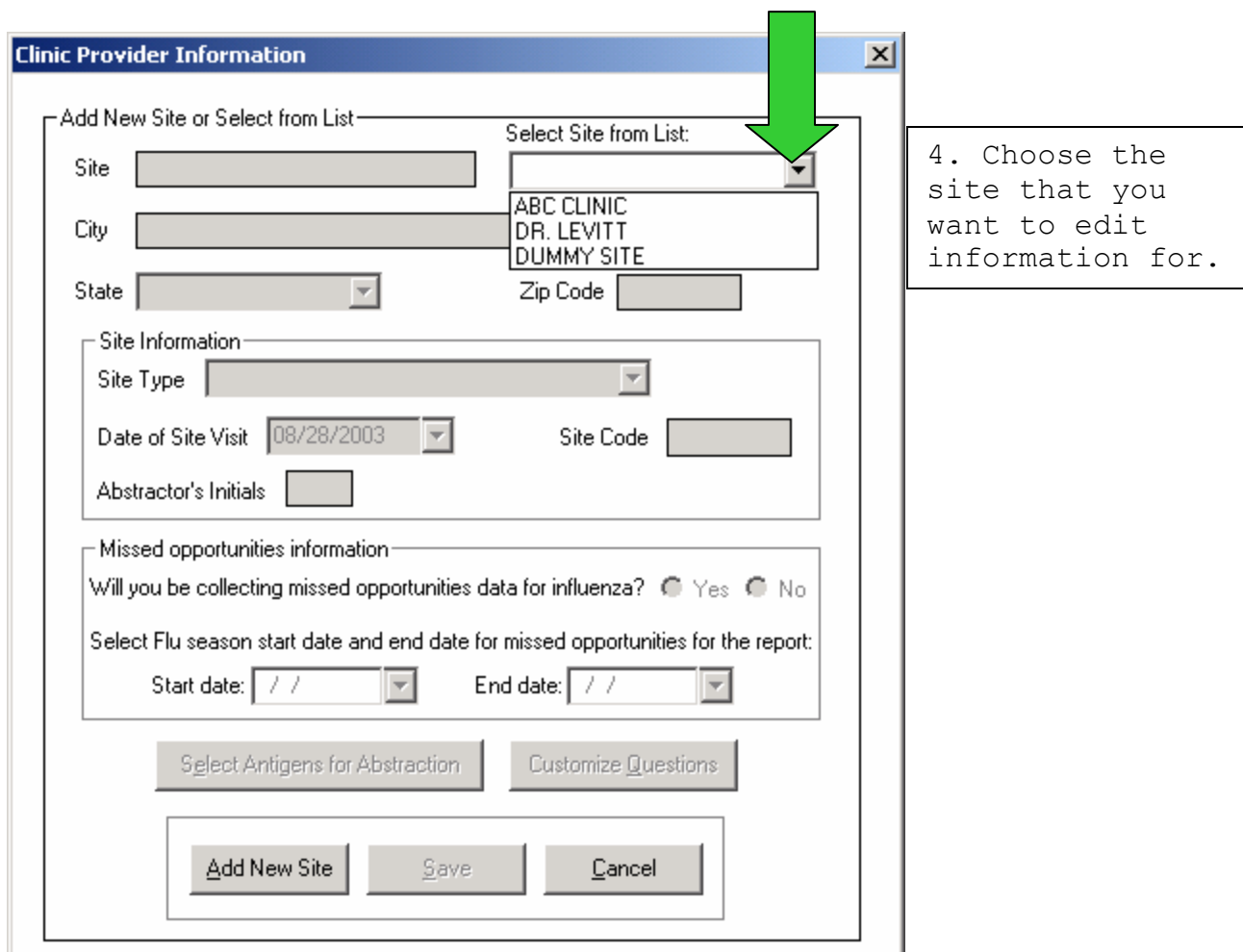
❖ *Note: If you click **CANCEL** instead of **SAVE**, your site will not be saved, and you will return to the main menu.*

12. Click **OK**. This will take you back to the main menu.

4. Editing Clinic Provider Information

13

To edit information about a clinic provider, follow steps 1 and 2 above in Section 3: Entering a new clinic site.

3. Click on the drop-down menu next to "Select Site from List".

4. Choose the site that you want to edit information for.

5. Once you have selected the appropriate site, change the address, site type, Date of Site Visit, Abstractor's Initials, and anything else that needs to be changed in order to match the information for the date and location where the assessment is taking place.

   Note: If you want to edit the custom questions for a provider, skip to the section in this manual titled Adding Additional Questions, where you will find an explanation about this.

6. Click **SAVE** to save the changes or **CANCEL** to disregard the changes.

7. If you clicked **SAVE,** you will get a confirmation message like this one letting you know that your information is saved:
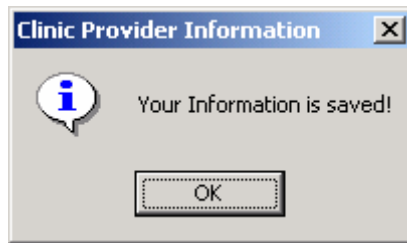
8. Click **OK**. This will take you back to the **MAIN MENU**.

8.Adding Additional Questions

1.   From the **Clinic Provider Information** screen, click on **Customize Questions**. You will come to a screen that looks like the one below.
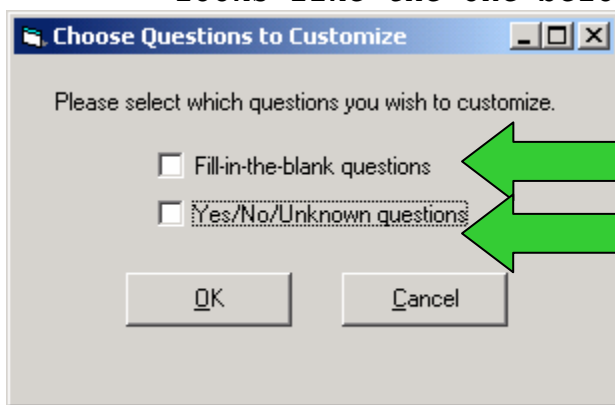
To create questions with open-ended answers, select "Fill-in-the-blank questions".

To create questions with yes/no answers, select "Yes/No/Unknown questions".

This screen allows you to select the type of questions you want ACASA to ask about each patient. You can either create questions that will have open-ended or yes/no answers.

2.   If you select to enter fill-in-the-blank questions, the next screen you will see will look like the one shown on the next page. If not, skip to #3.

Question Setup

Please enter fill-in-the-blank questions to be asked for

XYZ CLINIC

1.
2.
3.
4.
5.
6.
7.
8.
9.
10.
11.
12.
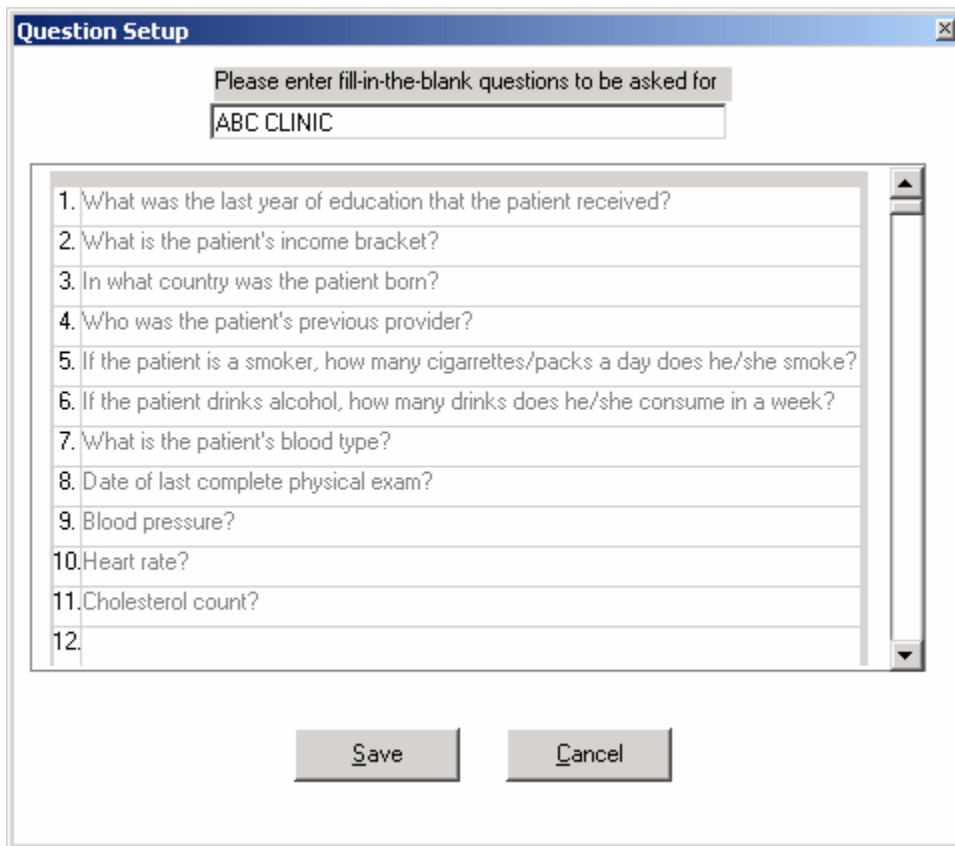
Save   Cancel

a. Type in your first open-ended question by placing your cursor inside the column next to 1.

This is the **Question Setup** screen for fill-in-the blank questions.

     b. When you have finished typing in your first question, move your mouse to the second row and click in the area next to 2.

     c. Repeat this process until you have entered all the fill-in-the-blank questions you want ACASA to ask (up to 35).

The screen on the next page gives an example of what the screen will look like when you are through entering your questions.

16
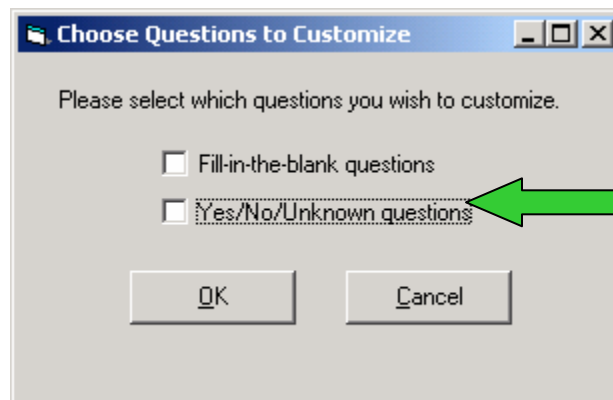
Question Setup

Please enter fill-in-the-blank questions to be asked for

ABC CLINIC

1. What was the last year of education that the patient received?
2. What is the patient's income bracket?
3. In what country was the patient born?
4. Who was the patient's previous provider?
5. If the patient is a smoker, how many cigarrettes/packs a day does he/she smoke?
6. If the patient drinks alcohol, how many drinks does he/she consume in a week?
7. What is the patient's blood type?
8. Date of last complete physical exam?
9. Blood pressure?
10. Heart rate?
11. Cholesterol count?
12.

Save   Cancel

       d. Click **SAVE** when you are through entering questions. This will bring you back to the **Clinic Provider Information** screen. <u>If these are all the custom questions you will need, skip to #13 below.</u>

   3.   If you selected to enter questions with yes/no answers, click on the **Customize Questions** button. You will see a screen that looks like this:

Choose Questions to Customize

Please select which questions you wish to customize.

☐ Fill-in-the-blank questions
☐ Yes/No/Unknown questions

OK   Cancel

4. Select the box next to "Yes/No/Unknown questions"

   5.   Click the **OK** button. This will bring you to the **Question Setup** screen for yes/no questions.

This screen allows you to add questions requiring a
yes/no answer. You can add up to 75 additional questions
for ACASA to inquire about on each patient.

6   To add a question, place your cursor in the white
     area where it says "Type questions here." Hold the
     Backspace key on your keyboard to delete the
     instructions, and then type in the text for your
     first question.

7   When you have finished entering your first question,
     move your cursor down to the next row and enter the
     next question.

Repeat #7 for each consecutive question. See example below.

8. To delete a question, highlight the row for the question you want to delete by clicking on the gray area to the left of the question. Then press the "delete" key on your computer's keyboard.

9. If you would like to move a question to appear in between two existing questions:
   a. Place your cursor in the area where the question number is located next to the question you want to move.
   b. Type over the existing question number with the question number for the location where you want to move the question, (example, to make the third question appear in the second place location, change the 3 next to the question to a 2).
   c. Click the **SORT BY NUMBER** button.
   d. Click the **RENUMBER QUESTIONS** button.

Your questions should now be in the order you want them.
See example below.

10.   Once you have finished adding the questions you want,
       click the **SAVE** button.

    ❖ _Note_: _You will not be able to delete questions or
      change the order in which questions appear once you
      have entered information on your first patient!
      Please double check to make sure the questions are the
      way you want them before continuing._

Question Setup

Please enter yes/no/unknown questions to be asked for

ALLNUM

▶	1	did patient continue beyond high school?
	2	asf
	3	rtf
	4	asdf
	5	asdf
	6	asdf
	7	asdf
	8	asdf
	9	asdf
	10	asdf
	11	asdf
	12	asdf
	13	asfd

You cannot delete or reorder existing questions because data
    has already been entered for patient(s).
To add a new question, click on 'Add New Question' and enter text.

[Add New Question] [Save] [Cancel]

Although you cannot delete a question or modify the order
of questions once data has been entered for an assessment
site, you can still add new questions. To add a new
question:

i.   Click on the **Add New Question** button.

ii.   The following screen will appear:

Enter Text for New Question

New Question:

[   ]

[OK]   [Cancel]

iii.   Enter the text for the new question.

iv.   Click **OK.** Your new question will appear at the
        bottom of the list of questions.

v.   Click the **SAVE** button.

11. After you have selected the antigens for abstraction and customized your questions, click the **SAVE** button to continue. You will get a message stating that your information is saved.
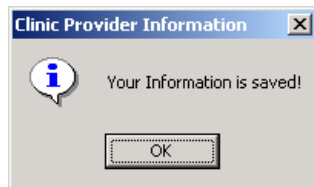
12. Click "OK"

13 Once you are happy with your customization for this site, you may decide that you will want to use this customization (including the questions you created) again later for other sites you will be assessing in the future. **If you think this is a possibility, <u>it is very important that you now save a copy of your database to a separate location</u>**!

14 To save a copy of this site for customization purposes, from the ACASA Main Menu, go to the drop-down menu called **File** and select **Save As:**
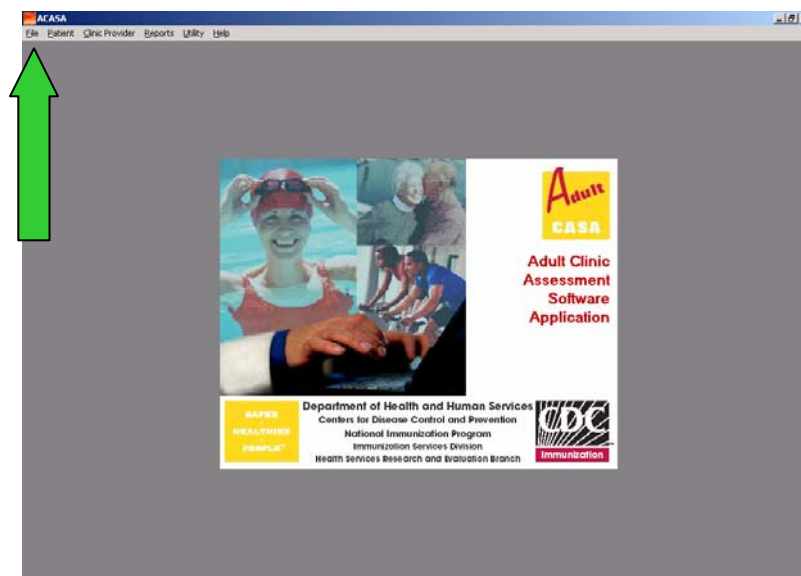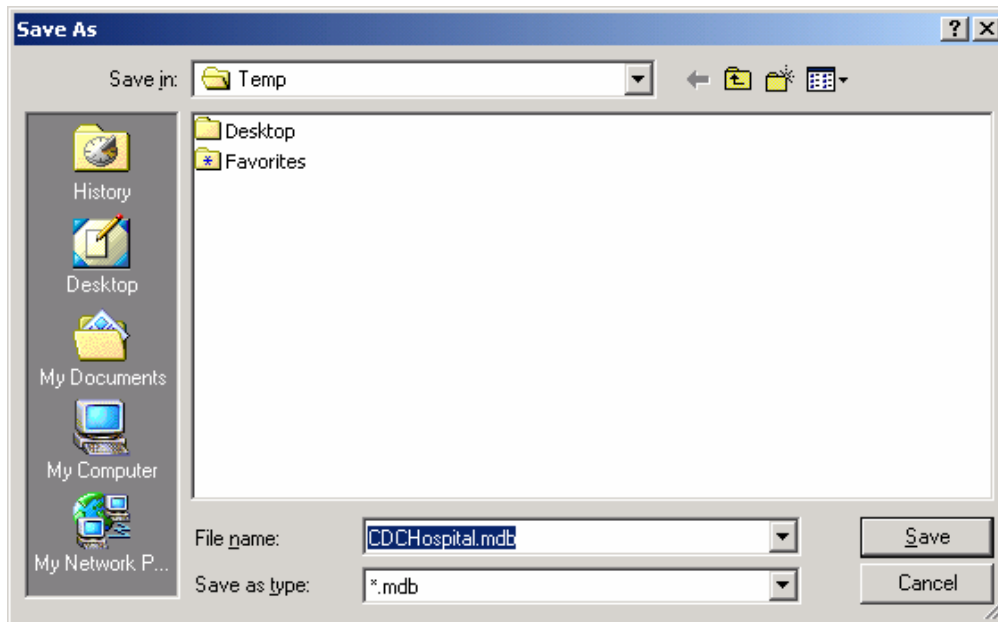
You will get a pop-up screen like the one above. The default file name is CDCHospital.mdb. It is the file that ACASA searches for to access your data. Change the filename and save it to a separate place on your hard-drive in a folder or a disk that is clearly marked "Customization copy".

    a. To create this folder, first find the place in your hard-drive or back-up drive where you want the folder to go (Example: "my documents" folder).

    b. Next, click on the "Create New Folder" icon at the top of the screen, which looks like a closed yellow file.
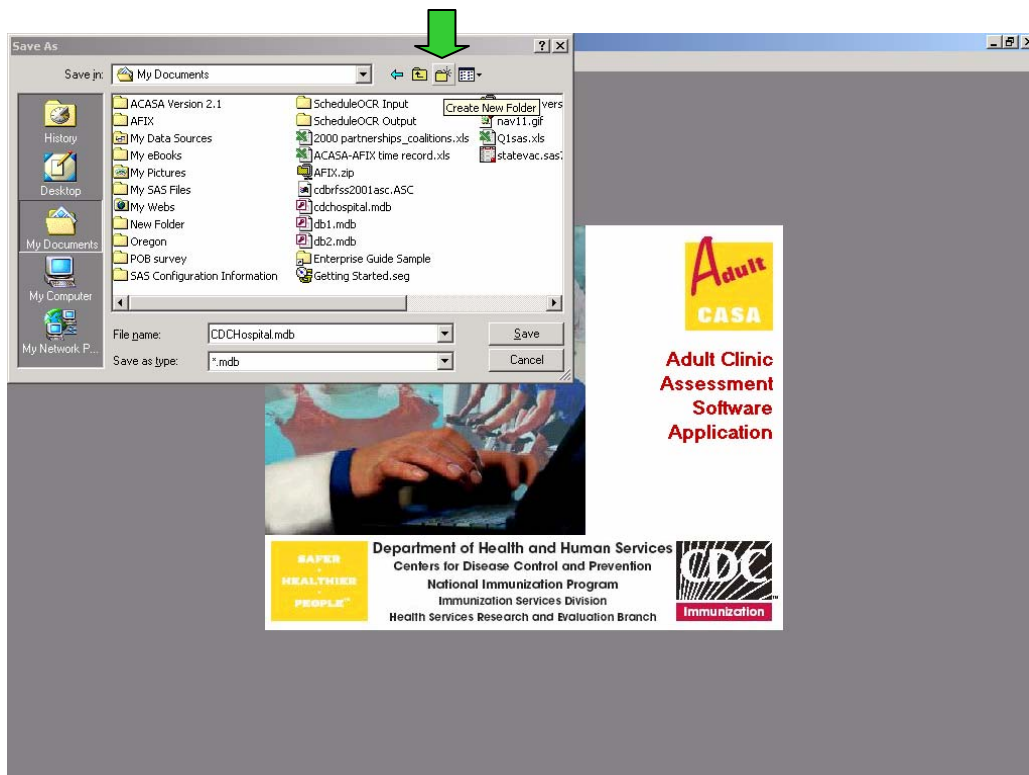
c. This creates a new folder. Rename the new folder "Customization copy" or give it another name that makes sense to you.

d. Click the **Open** button.
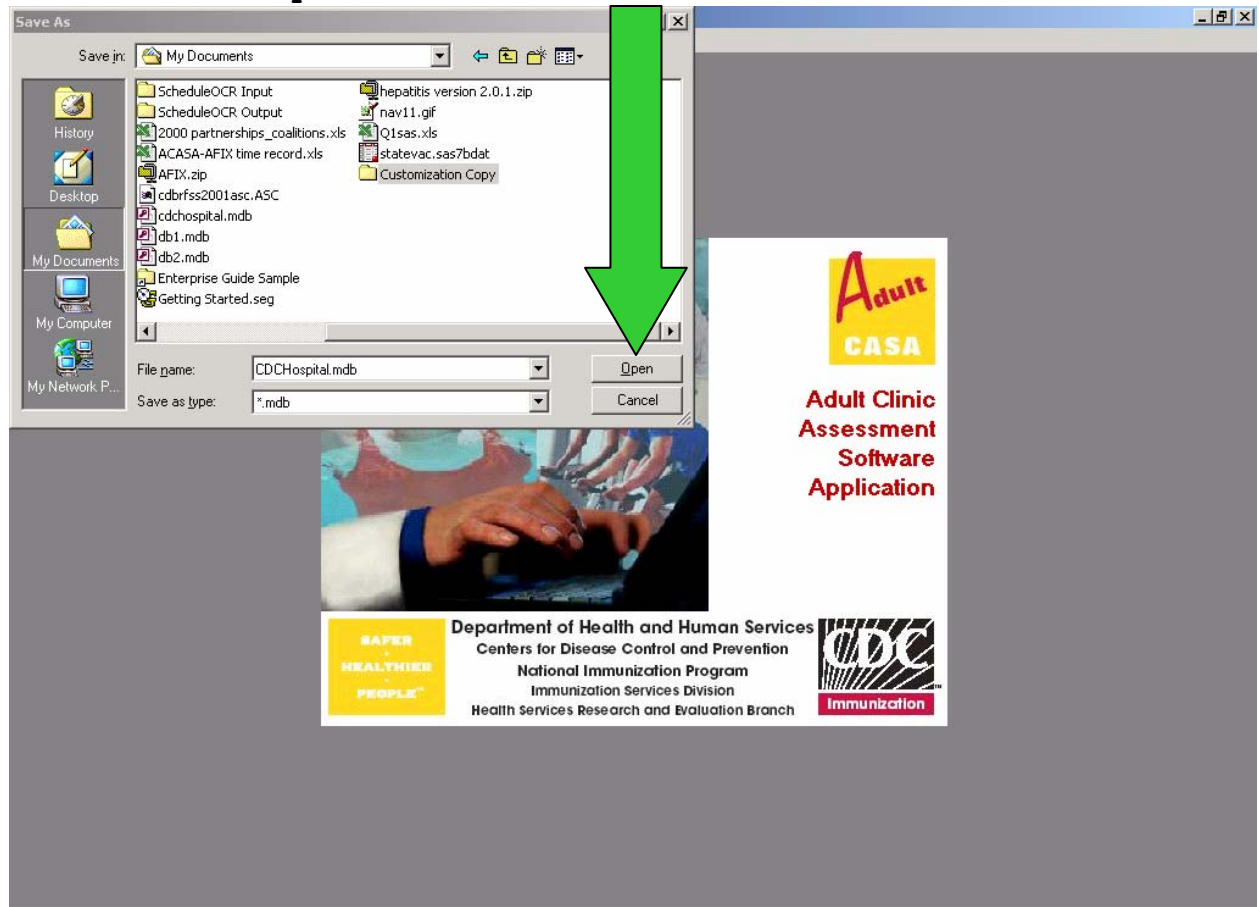
e. Now click the **Save** button.
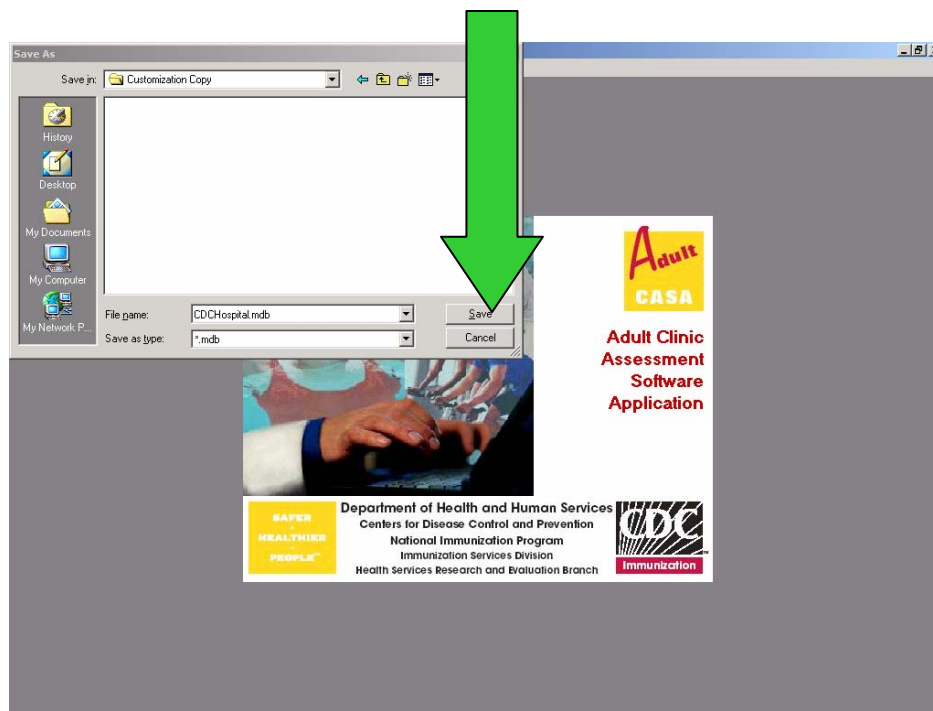
You will use this file later if you wish to create new sites with the same customization so it is important that you make note of where it is. For an explanation of how to create a new site with this customization, go to the section in this manual titled <u>Importing Data</u>.

5. Entering a new patient

1.   From the main menu, select the drop down menu for **PATIENT**.
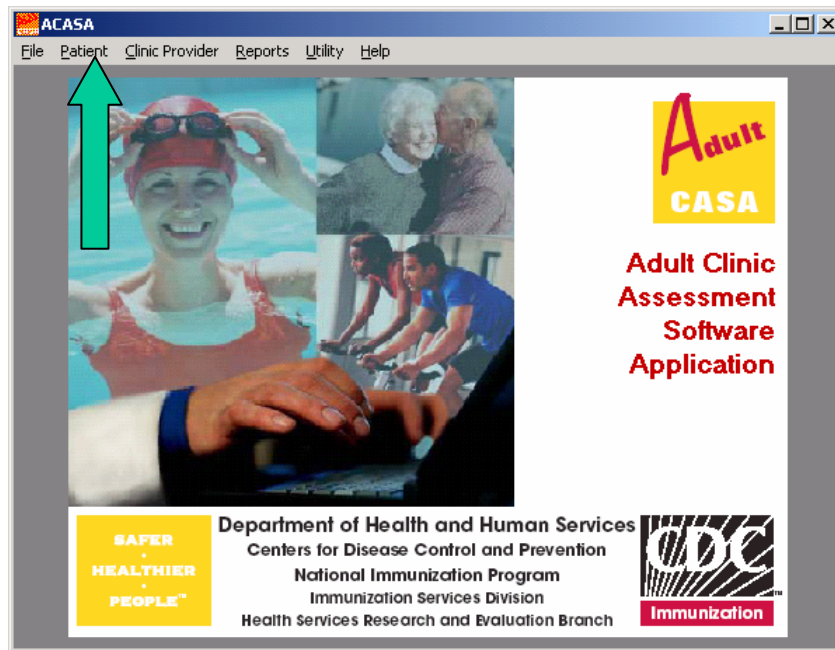
2.   Then select **NEW PATIENT** from the drop-down list. You will get a screen that looks like this:
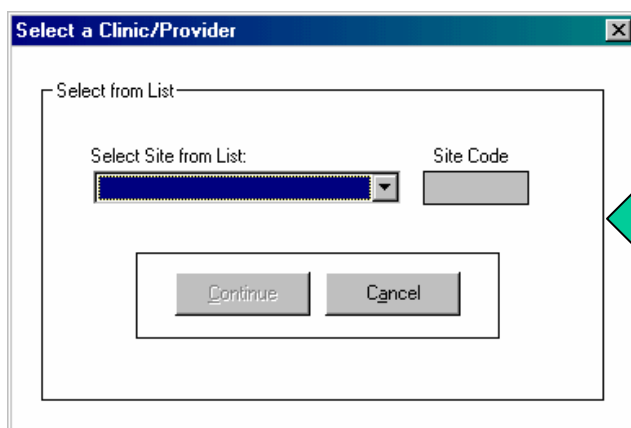
The system will have automatically created a random site code number for your clinic site, which will appear under "Site Code".

3.   Click on the arrow to the right of "Select Site from List:" to select the clinic site from which the patient belongs.

4.   Once you have selected your site, click **CONTINUE**. This will take you to the **Immunization Registration Entry (New Patient)** screen.

A patient ID number will automatically be generated for your patient

Immunization Registration Entry (New Patient)

Patient Identifiers

Site Code	Patient ID	Last Name	First Name	Middle Initial	Chart#
7115J	ABC227987				

Patient Information

Date Of Birth: / /   Insurance: First Visit: / /   Last Visit: / /

Sex: Race: Not Noted   Ethnicity: Not Noted

Address: City: State:

Zip Code: County: Phone Number: ( ) -

Notes   Next   Exit   Cancel

5.   Proceed to enter the information that you selected in the customization screen. (All the areas that are not grayed out)[1]. Under the "Patient Identifiers" section at the top of the screen, enter the patient's last name, first name, middle initial, and chart number (if applicable). Under the heading **CHART#** record the actual number on the patient's chart.

6.   Under "Patient Information", enter the patient's Date of Birth, Insurance type (if applicable), their first and last visits to the clinic, sex, race, and ethnicity. Enter dates: month/day/year (00/00/0000)[2] or choose a date from the drop-down menu. Enter the correct answers by selecting them from the drop-down menus given to the right of each question.

7.   In the next box, enter the patient's street address, City, State, Zip code, County, and Phone Number (as

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[1] If you are running Microsoft Windows XP™, then you may not see anything grayed out. However, you will only be able to enter data for the fields you selected during customization.

[2] The software requires that you enter at least six digits for dates. Therefore, you must put in zeros in front of single-digit days and months, and you must enter the year as four numbers. Please do this on all dates; otherwise, you will get an error message.

applicable. You may select the state from the drop-down menu to the right of "State".

❖ *Note: If you enter a date incorrectly, you will get an error message that looks like this:*
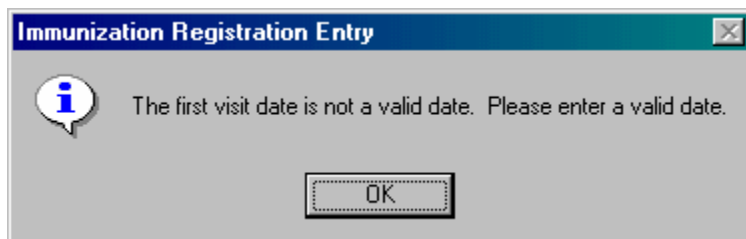
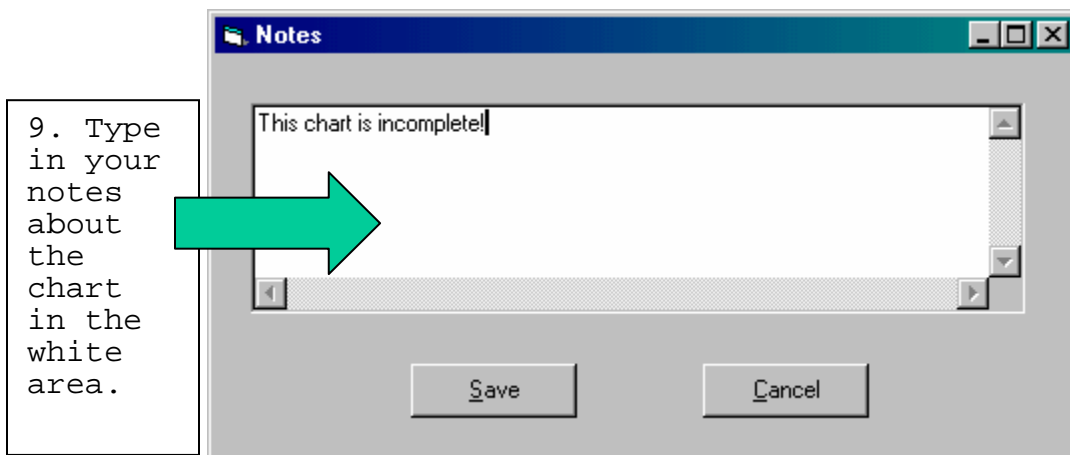**If you are not entering a note about a chart, you may now skip to step 11.**

8. As you are going along, if you notice something unique or unusual about a chart that you think would be important to feedback to a provider, , such as a way that the organization of a chart could be improved, select the **Notes** button at the bottom of the screen.

You will get a screen that looks like this:

9. Type in your notes about the chart in the white area.

10. Click on the **SAVE** button to save your comments. This will bring you back to the **Immunization Registration Entry (New Patient)** screen.

11. When you are through entering patient information, click **NEXT**. This will take you to the **Immunization History** screen.

> ❖ *Note: If you click **EXIT** instead of **NEXT**, you will not be completing the data entry on this patient. You will be sent to the **Main Menu** and will have to select the drop-down for **Patient**, then **Edit Patient** in order to go back to this patient. If you did not enter any information at all about this patient, a blank patient file will have been created, which should be deleted later if unused. (Refer to the section titled* Updating information on a patient *in this manual).*

> ❖ *Note: If you click **CANCEL** while you are in this screen, none of your patient information will be saved and a blank patient file* will not be created. *Any notes that you saved on this screen will no longer exist either.*

> ❖ *Note: If you choose **NEXT** instead of **CANCEL**, a blank patient file will be created, which should be deleted later if unused.*

6. Entering a patient's Immunization History

If you clicked NEXT in the **Immunization Registration Entry** screen, you will come to a screen titled **Immunization History**, which looks like this:

The patient's computer generated ID code, name and site code will appear in gray at the top of the screen.

You can use the **Back** button on the bottom left corner to go back to the previous screen and make changes.

1. Under **SELECT ANTIGEN**, go to the drop down menu and select the vaccine or toxoid of interest.

   ❖ *Note: Be careful to select the right antigen. For instance, if an adult booster of combination Tetanus and Diphtheria toxoids was administered, be sure to select "Tetanus and Diphtheria Toxoids Combined", which denotes Td, not the pediatric antigen DTP.*

   ❖ *Although the minimum age of patients that can be entered is age 9, pediatric antigens are available (denoted by an asterisk) in order to allow the user to record past vaccination record information on adolescent and adult patients.*

2. If there is a vaccination date recorded in the medical
    chart, enter that date month/day/year (00/00/0000) or choose
    a date from the drop-down menu. Skip to #5 below.

3. If no vaccination date is given and there is a reason given
    in the chart why the patient was not vaccinated, enter that
    date month/day/ year (00/00/0000), or choose a date from the
    drop-down menu, in which the vaccination was offered or the
    reason why the patient did not get vaccinated occurred.
    Next, place your cursor over the arrow next to the box
    marked **REASON NOT VACCINATED**.

4. Select the reason not vaccinated from the drop-down menu.
    If the reason not vaccinated does not fit any category,
    select "other", and type the reason under "Other Reason".
    If no reason is noted, leave the reason blank.

5. Click on **ADD TO HISTORY**. Please note: Select only the
    antigens you are abstracting for. Record all vaccinations
    that are documented in the chart, whether or not the vaccine
    was given at the specific clinic. **Unless you are deleting an
    antigen, you may now skip to step 7.**

6. The antigens you have entered and the vaccine dates or
    reasons not vaccinated will appear at the bottom of the
    screen under "Vaccination History…" If you notice that a
    mistake was made and you wish to delete an antigen, double
    click on the arrow to the left of the antigen until **REMOVE
    FROM HISTORY** is highlighted. Click on **REMOVE FROM HISTORY**.
    You will get a prompt that looks like this:
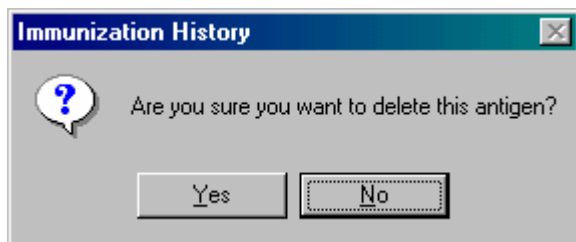
    Click **YES** to delete the antigen or **NO** to continue.

7. If a vaccination was not given and there is no reason
    recorded in the chart, then it is ok to proceed without
    entering any information about that antigen.
    Alternatively, you could select the antigen, enter a date
    and type "no reason given" in the **Other Reason** box.

    ❖ *Note: If you do not enter any reason or select (none)*
      in the "Reason not vaccinated" drop-down menu, then
      any date you entered for that antigen will be counted
      as a vaccination date! If no vaccination was given,
      you must either give a reason or not enter a date!

8. When you are finished entering all the vaccinations of interest, click **NEXT** at the bottom of the screen to proceed.

The next screen you will come to is the **Risk Factors** screen.

You can use the **Back** button to go back to the previous screen and make changes.

You can record notes on this screen as well, using the procedure explained previously.

31

❖ _Note: if you are using the **Next** button to switch between screens, you may get a message that looks like this:_

Risk Factors ✕

❌ Please enter number of visits!

[OK]

If you get this message, click **OK** and then look through the chart for the number of visits during the influenza season of interest. You must enter this number at the top of the screen where it says "Missed Opportunities for Influenza Vaccine" prior to going forward to the next screen.

7.   Entering a patient's risk factor information

1. If you have customized the system to record missed opportunities for influenza vaccine, under **MISSED OPPORTUNITIES FOR INFLUENZA VACCINE**, record the number of <u>visits</u> that the patient made to the clinic for any reason, during the time period of interest that you have customized (Do not count telephone correspondence). You must have decided on the criteria for this prior to the date of the chart audit and ensured that <u>all data abstractors</u> are recording for the same time period (See ACASA User Tools manual for more on planning for an assessment).

2. In the **CHECK ALL THAT APPLY** box, check the general category of any high-risk conditions, social or behavioral factors recorded in the chart for that patient.[3] (If you aren't sure whether the patient's diagnosis falls under one of the categories, <u>right click</u> on the category in question, and a list of high-risk conditions with corresponding ICD9 diagnostic codes that fall under that category will emerge.) Some of the menus will include indications for both pneumococcal and influenza vaccines, but others will only include one or the other. The menus are there to give the user more information. For categories where there is a + before the category name, <u>left-click</u> on the + and a list of choices will appear. Place your checkmark on the correct choice. For example, see "illegal drug use" in the screen shown on the next page.

---

[3] Please note that the ICD9 code lists included in ACASA identify the <u>minimal</u> indications for influenza and pneumococcal vaccine.   Other indications or risk factors for vaccination (agreed on beforehand by all abstractors and the chart audit coordinator) should be typed in under the "OTHER" category.

Risk Factors

Patient
ID: ABC227987   Name: [   ]   [   ]

Missed Opportunities for Influenza Vaccine
Number of visits [2]   (between 9/20/2002 and 12/25/2002)

Check all that apply

Medical Conditions
- ☐ Asplenia
- ☐ Asthma
- ☐ Blood Disorder
- ☐ Cancer/HIV/Organ Transplantation
- ☐ Cerebrospinal Fluid (CSF) Leak
- ☐ Diabetes mellitus
- ☐ Endocrine disorder other than diabetes
- ☐ Heart Disease
- ☐ Hepatitis C Antigen Positive/Chronic HepC
- ☐ Liver Disease (Chronic or Cirrhosis)
- ☐ Lung Disease Other than Asthma
- ☐ Never had chickenpox (varicella)
- ☐ Pregnancy
- ☐ Renal Disease

Social and Behavioral Factors
- ☐ Alcoholism
- ⊟ Illegal Drug Use
  - ☑ IV Drug use
  - ☐ Non-Injecting Drug use
  - ☐ Drug Use: type unknown
- ⊞ Health Care Worker/Other Occupation
- ☐ American Indian or Alaskan Native
- ☐ Sexual Acitivity (High Risk: >2 partners/6 mo)
- ☐ Other

Explain Other
[   ]

Notes   Back   Next   Exit   Cancel

Pop-up for "Illegal Drug Use"

3. If the high-risk condition is not listed, check **OTHER** and type an explanation under **EXPLAIN OTHER**. This will not affect the coverage algorithms for your reports, and there is currently no report of the "other" answers. However, this information can be accessed by going to the place where your data is stored and opening up a table called **RiskFactorInfo** (This is explained in the section of this manual titled Accessing the Database).

4. Once you are finished selecting that patient's conditions, click **NEXT** at the bottom of the screen. If there are additional questions that you customized for your data collection, the next screen you will come to will be the first **Questions** screen where you enter the answers to the custom questions you created. If so, skip to Chapter 8: Entering additional information about a patient. Otherwise, the next screen you come to will be the **Immunization Registration Entry (New Patient)** screen. You can now proceed to enter information on the next patient.

To get back to the main menu instead of entering a new patient

Select **CANCEL** at the bottom of the screen you are on. **Do not press EXIT**, unless you entered some information about a new patient but want to come back to it later. You will not get an error message but if you did not enter any information or entered an incomplete patient record, please note that by pressing **EXIT** instead of **CANCEL**, <u>you will have created a new patient in the system</u>. You will have to either edit that patient record later (Refer to the chapter in this manual entitled <u>Updating information on a patient</u>, or delete that patient record prior to running any reports. Refer to the chapter in this manual entitled <u>10. Deleting a Patient</u>.

8.   Entering additional information about a patient

1.   If you clicked **NEXT** on the **Risk Factors** screen, you should be at a screen titled **Questions.** If you created open-ended questions, the first screen will look something like this example:


Use the scrollbar to scroll down to see all the remaining fill-in-the-blank questions.

2.   Type in the answers to each open-ended question by placing your cursor in the white area under each question and typing the answer using your computer's keyboard.

   * <u>Note</u>: Responses must be 100 characters or less. If you accidentally enter too many characters for your response and

*press **NEXT** to continue, you will get an error message that looks like the one on the next page.*

Questions

All responses must be 100 characters or less.

OK
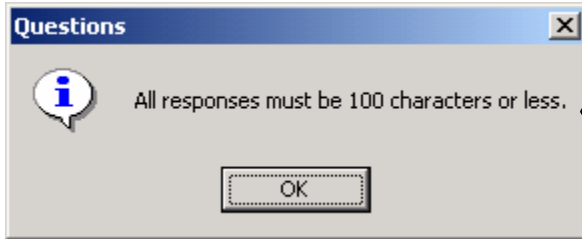
If you get this message, click **OK** and revise your answers accordingly.

3.	When you are finished answering all of the questions on this screen, you may either click the **NEXT** button at the bottom of the screen, **OR** if you are not happy with your answers and would like to start over, click the **CLEAR** button. This will erase your answers on this screen.

4.	Click **NEXT** to continue to the next screen. If you entered customized Yes/No/Unknown questions, they will appear here. If not, this will take you back to the **Immunization Registration Entry (New Patient)** screen. See example Yes/No/Unknown **Questions** screen on the next page.

Questions

Patient

Patient ID	First Name	Last Name	Site Code
ABC185574	CURT	DUE	22464

1. Has the patient received hepatitis C counseling?	○ Yes ○ No ○ Unknown
2. Has the patient received hepatitis C testing?	○ Yes ○ No ○ Unknown
3. Has the patient ever been tested for HIV?	○ Yes ○ No ○ Unknown
4. Has the patient ever received blood products intravenously? ○ Yes ○ No ○ Unknown
5. Is the patient an organ donor?	○ Yes ○ No ○ Unknown

Use the scrollbar to scroll down to see all the remaining Yes/No/ Unknown questions

Put a check mark with your cursor next to each answer.

Notes

Back   Next

Exit

Clear

Cancel

If you notice you have made a mistake and want to change your answers, click the **CLEAR** button at the bottom of the screen and re-enter the answers.

      1) Answer all Yes/No/Unknown questions (if applicable) and click **NEXT**. This will send you back to the **Immunization Registration Entry (New Patient)** screen. <u>You can now proceed to enter information on the next patient.</u>

<u>To get back to the main menu instead of entering a new patient</u>

Select **CANCEL** at the bottom of the screen you are on. **Do not press EXIT**, unless you entered some information about a new patient but want to come back to it later. You will not get an error message but if you did not enter any information or entered an incomplete patient record, please note that by pressing **EXIT** instead of **CANCEL**, <u>you will have created a new patient in the system</u>. You will have to either edit that patient record later (Refer to the chapter in this manual entitled <u>Updating information on a patient</u>, or delete that patient record prior to running any reports. Refer to the chapter in this manual entitled <u>10. Deleting a Patient</u>.

<u>Note</u>: The questions asked about on the previous two screens are user defined. Refer to the section in this manual titled "<u>Adding Additional Questions</u>"

9.   Updating information on a patient

1.   From the main menu, select the drop down for **PATIENT**.
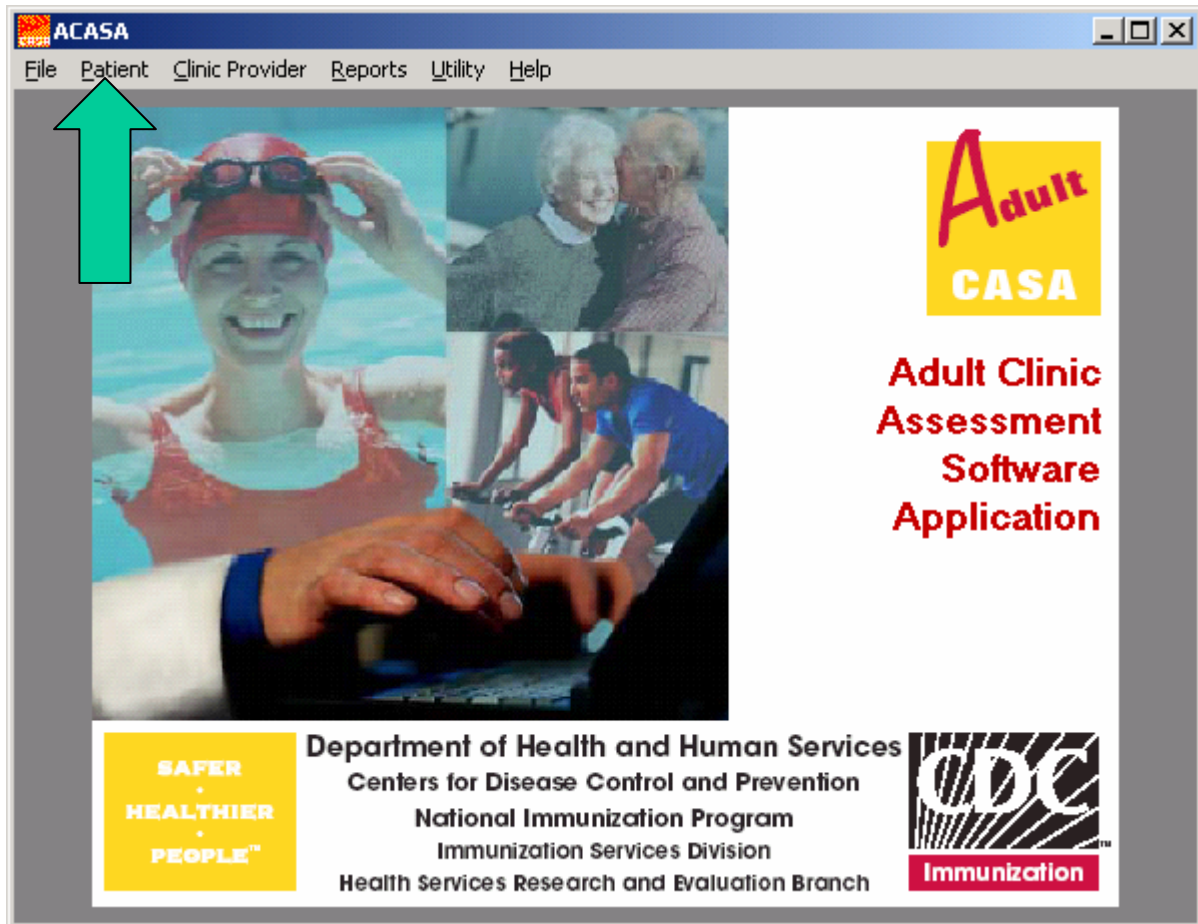
2. Select **EDIT PATIENT**. The **Select a Patient** screen will appear (See next page):

3. Select the clinic site that the patient belongs to from the first drop-down menu.

Select a Patient

Select from List

Select a Site:
ABC CLINIC

Site Code
71153

Select a Patient:

PatientID	Patient Name	Chart #
ABC971219		34
ABC227987		100

Continue   Cancel

Patient Listing

4. Select the patient by highlighting his/her identifiers in blue.

*Note: You can more easily identify patient records by sorting the information on this screen. You can do so by right clicking with your mouse anywhere inside the **Select a Patient** box. This allows you to either sort by chart ID or last name. Following the arrow to the right of either option will give you the ability to sort in either ascending or descending fashion.*

You can see a report of all the patients entered under this provider site by clicking on the **Patient Listing** button at the bottom of the screen. This will produce a screen view of the **Provider Patient Listing** report. To exit out of this report, click the **x** at the top right hand corner of the report screen. For more information about this report, refer to the section in this manual titled **Generating a Provider Patient Listing Report**.

5.   Click **CONTINUE**.

6.   Following procedures 1 through 5 above will bring you back to the **Immunization Registration Entry** screen for the patient you have selected. You may make changes on this screen and continue forward through the screens as normal, making changes as necessary.

7.   Once you have edited the current patient, clicking **NEXT** will bring you back to the **Select a Patient** screen, where you can proceed to edit the next patient.
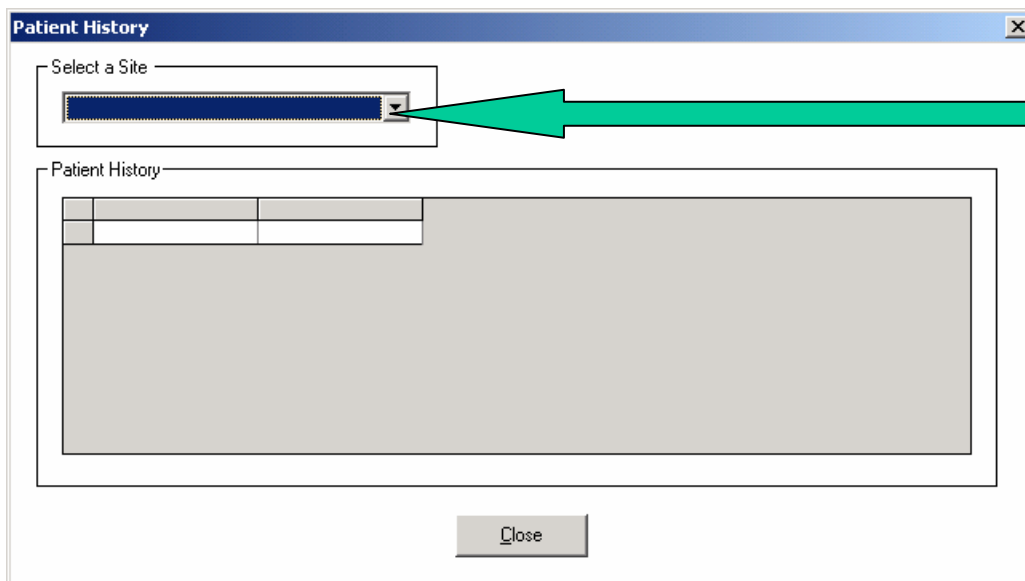
8.   When you are through editing patients, click **CANCEL** to get back to the **Main Menu**.

To see a list of patients you have entered and the changes you have made on them, you may do so by following these procedures:

1.   From the main menu, select the drop down for **PATIENT**.
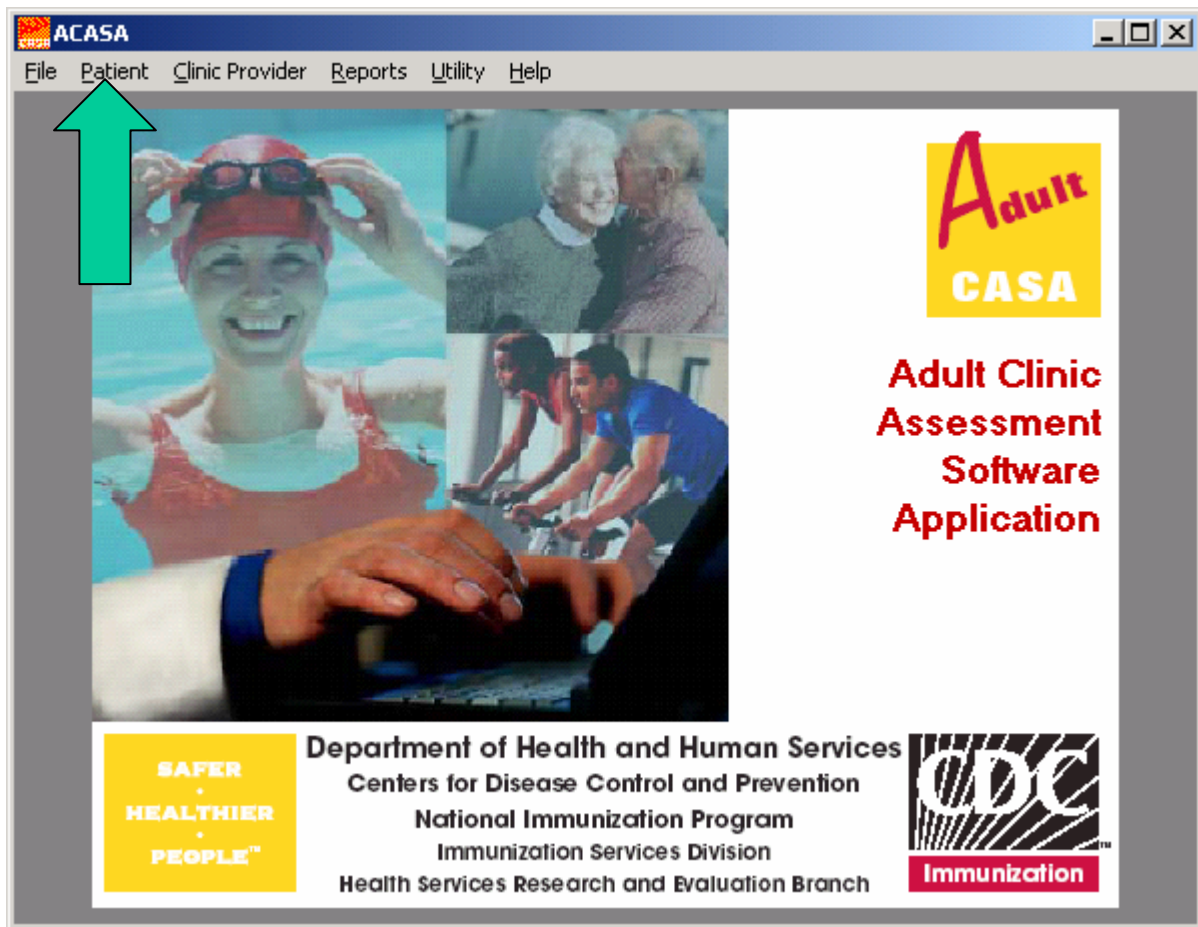
2.   Select **PATIENT LISTING**. The following screen will appear:

3. From the drop down list on the left, select the clinic that the patients are from.

A list of patients you have entered for that clinic site will
appear.

The counter below keeps track of how
many patients you have entered.

4. Scroll
down and
across the
list by
placing
your
cursor
inside the
white area
of the
form or by
using the
scrollbars
underneath
and to the
right of
the
screen.

Patient History

Select a Site

| DR JOES |

You have entered 101 patient(s).

Patient History

	SiteCode	ChartID	PatientID	FirstVisit	LastVisit	FirstName
	27454	8024	DR 1805			
	27454	4366	DR 136144			
	27454	3555	DR 741929			
	27454	2154	DR 656885			
	27454	4783	DR 369920			
	27454	4679	DR 989983			
	27454	8342	DR 451579			
	27454	6570	DR 305438			

Close

*Note: You can more easily identify patient records by sorting the
information on this screen. You can do so by right clicking with
your mouse anywhere inside the **Patient History** box. This allows
you to either sort by chart ID or last name. Following the arrow
to the right of either option will give you the ability to sort in
either ascending or descending fashion.*

*Note: You **cannot** make updates on patient information that is
incorrect by typing the correct information within this form.
If you notice any incorrect information, you must return to
the main menu and select the **PATIENT** drop-down menu, then **EDIT
PATIENT**, as explained in section 9.*

5.   Click **CLOSE** to return to the main menu.

10. Deleting a Patient

1.   From the main menu, go to the drop down titled **PATIENT**.
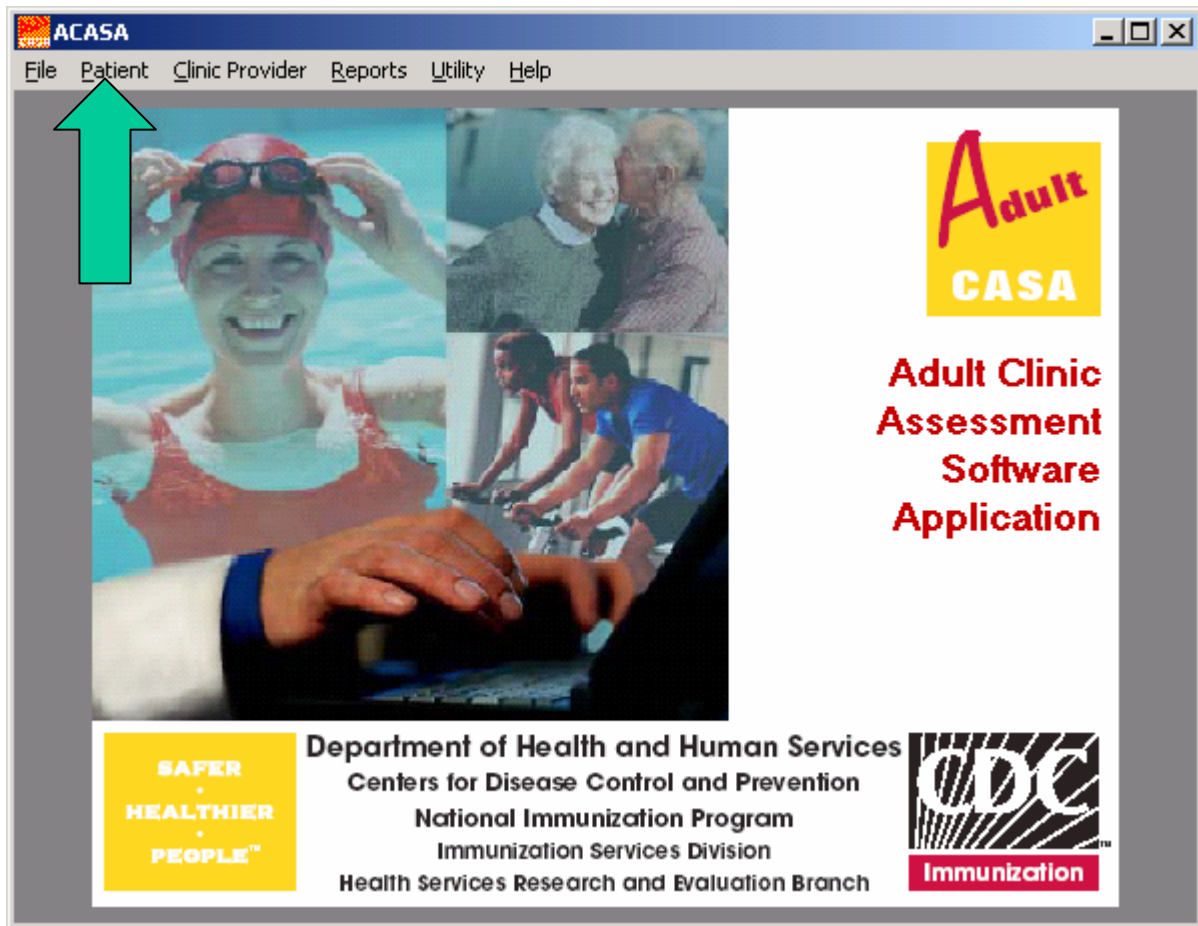
2.   Click on **DELETE PATIENT**. The **Delete Patient** screen will come up.

3. Select the clinic site from the drop down menu on the right.

4.
<u>Double click</u> on the gray area to the left of the patient you want to delete.

If you collected patient names, the patient's name will come up under **SELECTED PATIENT**.

The patient's ID number will come up under **SELECTED PATIENT ID**.

Delete Patient

Delete Patient

Choose Site From Combo Box On Right

75897 | abc | abc ▼

Patient Information - Double Click On Left Side Of Grid To Select A Patient

Patient Information

	SiteCode	PatientID	FirstVisit	LastVisit	FirstName
▶	75897	ABC837807			c
	75897	ABC218908			c
	75897	ABC767087			Dan

Patient To Delete

Selected Patient

Selected Patient ID

Select One

Delete Patient | Cancel Delete
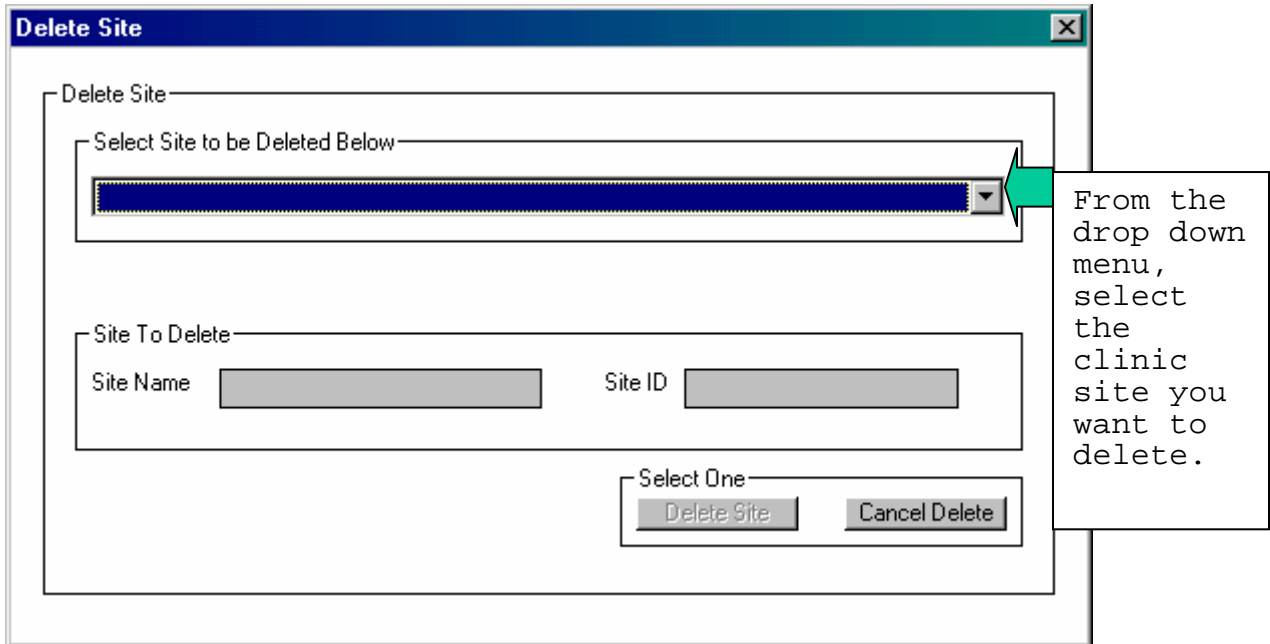
5.   Click on **DELETE PATIENT** at the bottom of the screen. A
      message box will come up asking you if you are sure you want
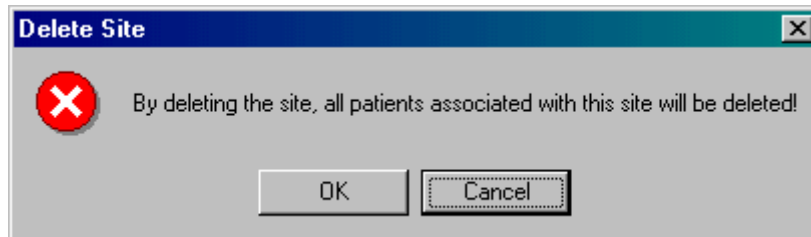   to delete this patient.

Delete Patient

❓ Are you sure you want to delete this patient?
    Patient Name: c b
    PatientID: ABC837807

Yes | No
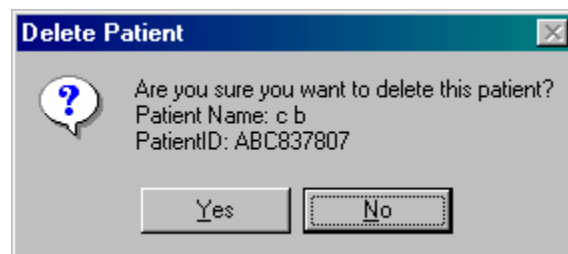
6.   Click **YES** and the patient will be deleted. Then either
      click on **CANCEL DELETE**, or **CONTINUE** to return to the main
      menu.

43

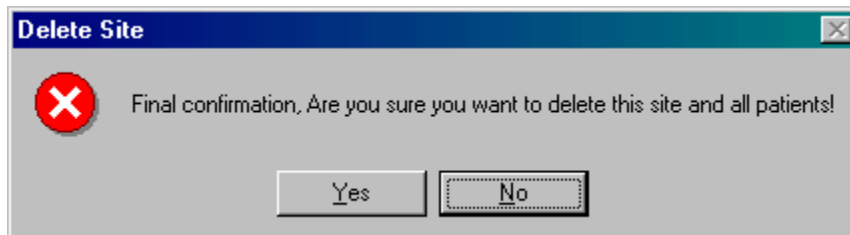# 11. Deleting a clinic site

1.   From the main menu, select the **CLINIC PROVIDER** drop down
      menu.
2.   Select **DELETE CLINIC PROVIDER**. A screen will come up called
      Delete Site.

From the drop down menu, select the clinic site you want to delete.

3.   Once the site is selected, click on **DELETE SITE**. A message
      will come up notifying you that by deleting the site, all
      patients associated with the site will also be deleted.

4.   Click **OK** if you want to go ahead and delete the site. A
      final confirmation notice will come up asking you if you are
      sure you want to delete the site and all its patients.

5.   Click **YES** to delete the site.
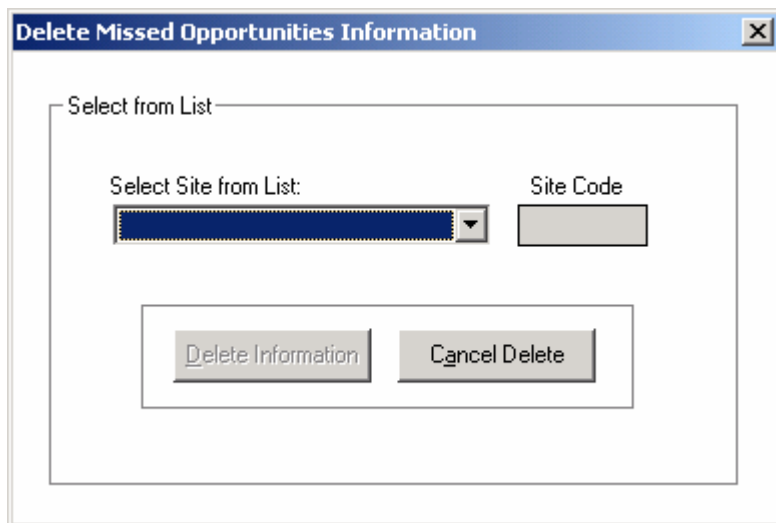
12. Deleting Missed Opportunities Information

If you are returning to a clinic to do a follow-up assessment and you would like to look at missed opportunities for a different influenza season than the one you originally recorded information on, or you want to change the dates you entered previously for missed opportunities for influenza once data has already been entered for a site, <u>you will need to delete all missed opportunities data previously recorded for that clinic site</u>! To do so, follow these steps:

1. From the **Main Menu**, select "Clinic Provider" from the drop-down menu.
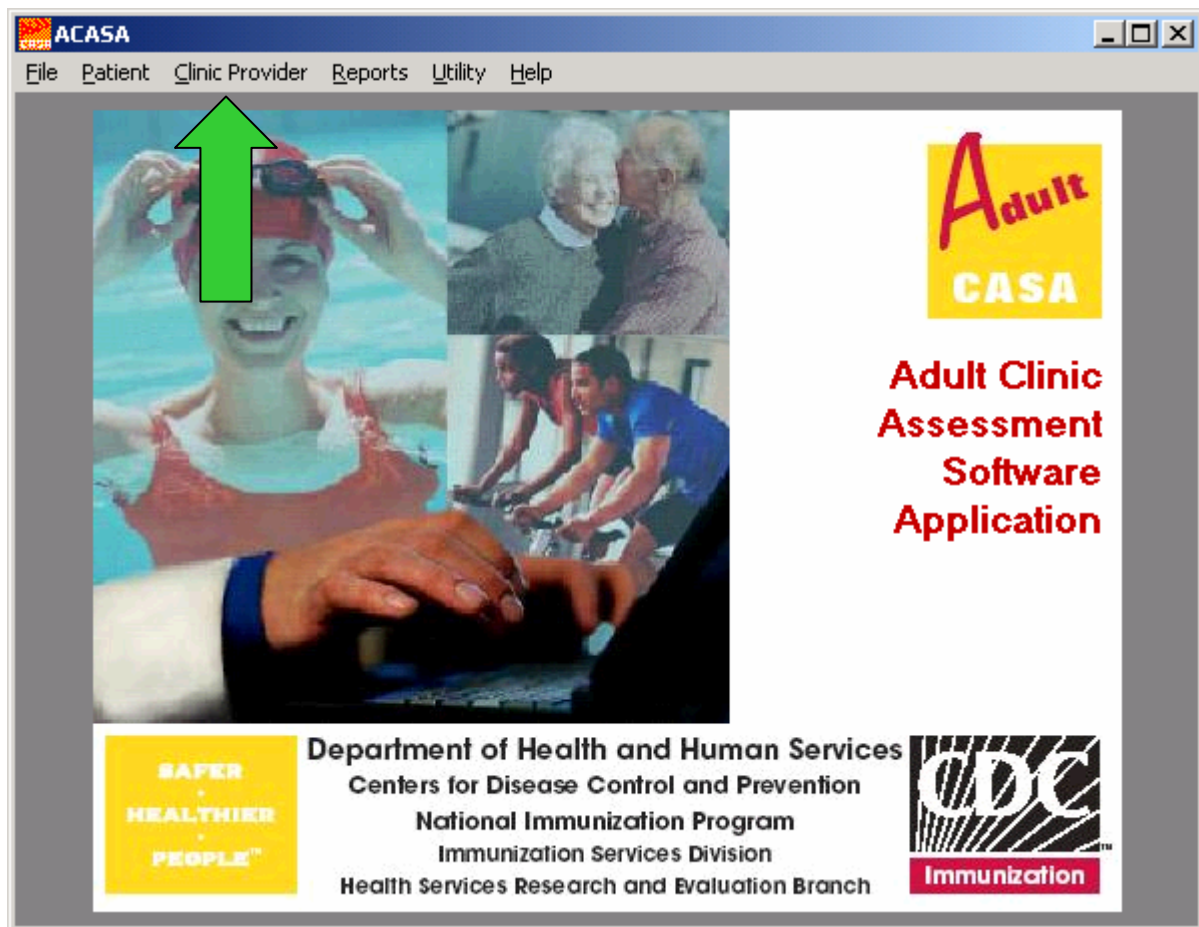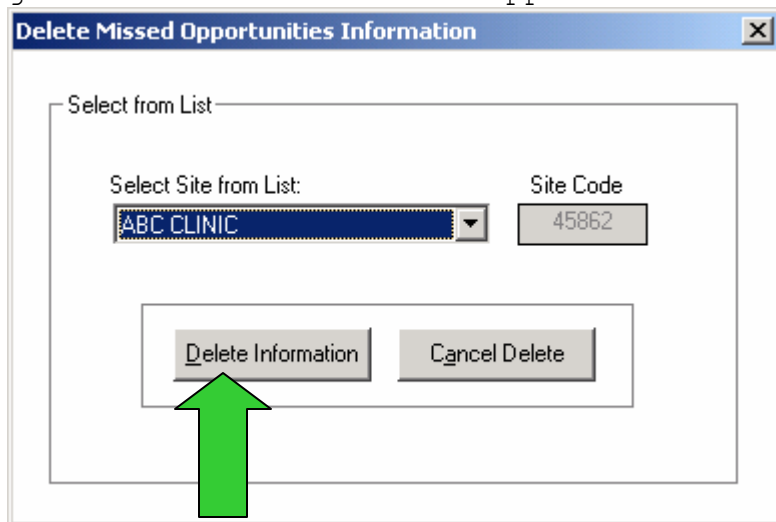
2. Select "Delete Missed Opportunities Information". This will take you to a screen that looks like this:

3. Select the clinic site for which you would like the missed opportunities data deleted by selecting it from the drop-down menu next to "Select Site from List".
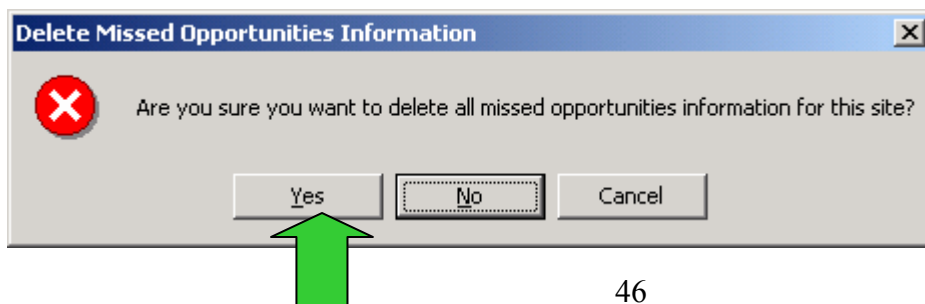
Once you have selected the clinic site, its name and computer-generated Site Code will appear on the screen.

4. Click the **Delete Information** button.

You will get a pop-up screen asking you if you are sure you want to delete the missed opportunities information for this site:
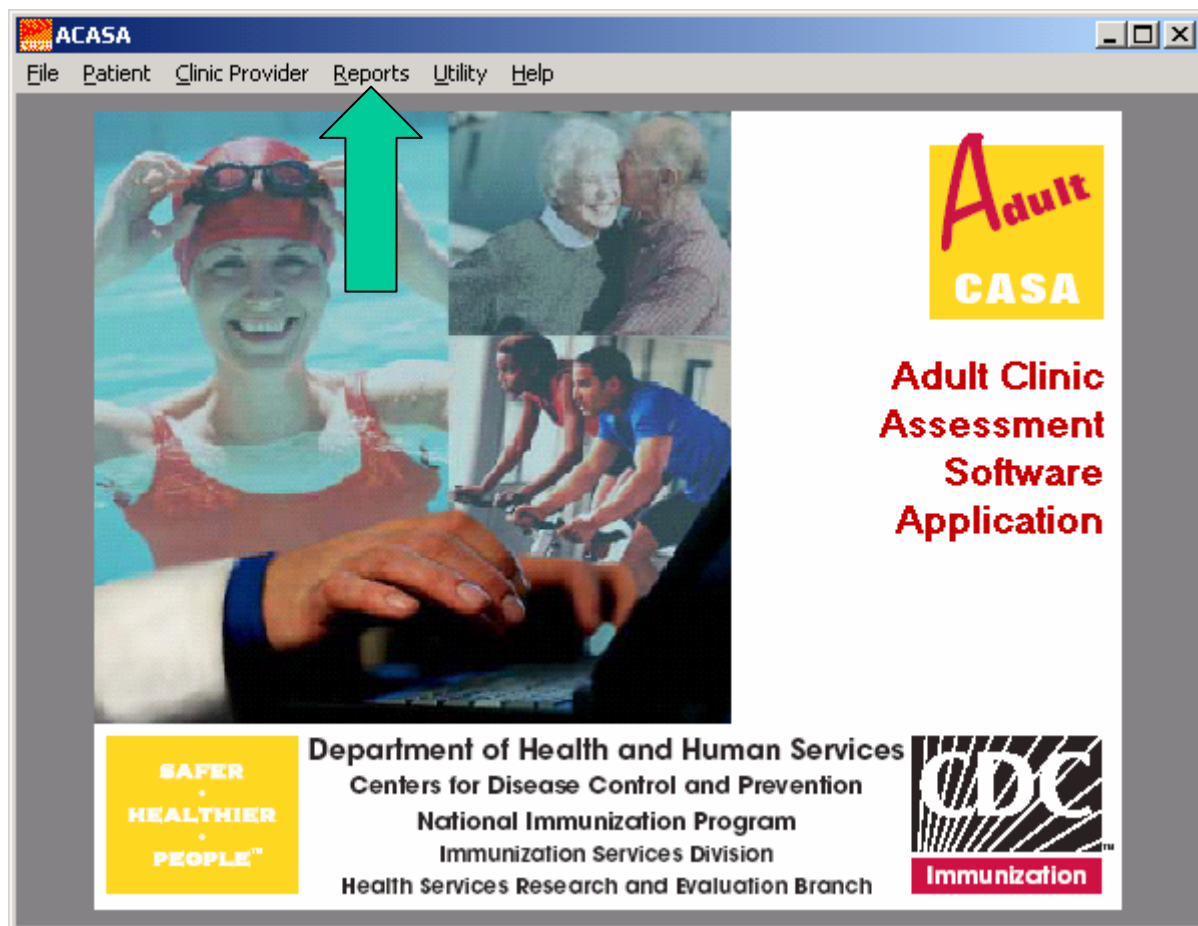

46

5. Click the **Yes** button to delete the missed opportunities data for influenza, or click **No** or **Cancel** if you do not want to delete this information.

Clicking **Yes** will delete the information and return you to the Main Menu.
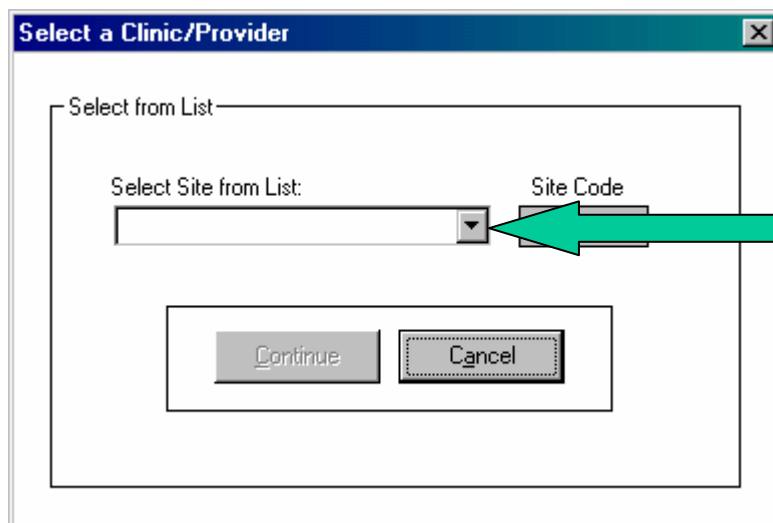
13.   Generating Coverage Reports

1.   From the main menu, select the drop down menu titled **REPORTS**.

(ACASA 3.0.1 has the capability of generating eight different types of reports: Coverage, Demographic, Provider Patient Listing, Provider Patient Immunization Listing, Notes, Patient Immunization Cards and Customized Questions (yes/no & fill-in-the-blank) Answer Reports).

13.1 Generating an Adult Coverage Report

1.	After you have selected the drop down menu titled **REPORTS** from the main menu, select **COVERAGE REPORT**. From the drop-down list that appears to the right, select **ADULT SUMMARY REPORT**. You will get a screen titled **Select a Clinic/Provider**.

2. Choose the clinic site from the drop down menu under **SELECT SITE FROM LIST**.

3.	Once you have selected a site, click **CONTINUE** at the bottom of the page. You will get a screen titled **Select Flu Season(s).**

This screen gives the user the option of having the report generate coverage on up to two influenza seasons. The user can define the dates of those influenza seasons. An influenza season typically runs from October through February. See the example on the next page.

Select Flu Season(s)

Please select start and end dates for flu season(s) for report.

	Start date	End date
Flu Season one	10/01/2000	02/28/2001
Flu Season two	10/01/2001	02/28/2002

[Continue]   [Cancel]

4.   Once you have selected your influenza season(s) for the
       report, click **Continue** at the bottom of the screen to
       proceed. This will generate a report titled **Adult
       Vaccination Coverage Summary Report**.

Adult Vaccination Coverage Summary Report

Site/Provider: ALLNUM
Location: Stone Mountain, anystate 30087
Date of Assessment: 6/24/2002

Age (DoB)   19 (6/13/1983)   -   81 (9/14/1920)
Number of Records: 100

Antigens	Age Group			
	19 - 64 Years of Age			65+ Years of Age
	Total	(%)	At High Risk (%)	Total	(%)
	90		19	10	
Influenza					
Influenza vaccine from 10/1/2001 - 2/28/2002	14	15.56	7	36.84	6	60.00
Influenza vaccine from 10/1/2002 - 2/28/2003	1	1.11	1	5.26	0	0.00
One or more missed opportunities from 9/3/2002 - 9/27/2002	90	100.00	19	100.00	8	80.00
Pneumococcal			22		
At least one Pneumococcal Polysaccharide	13	14.44	11	50.00	9	90.00
Revaccinated one or more time	3	3.33	3	13.64	0	0.00
Hepatitis B			4		
At least one dose of Hepatitis B vaccine	11	12.22	2	50.00	0	0.00
Two doses of Hepatitis B vaccine	8	8.89	2	50.00	0	0.00
Three or more doses of Hepatitis B vaccine	6	6.67	1	25.00	0	0.00
Hepatitis A			2		
At least one dose of Hepatitis A vaccine	2	2.22	2	100.00	0	0.00
Two or more doses of Hepatitis A vaccine	2	2.22	2	100.00	0	0.00
MMR			47		
At least one Measles, Mumps and Rubella vaccine	7	7.78	6	12.77	0	0.00

5.   Depending on what version of Crystal Reports you have
       installed on your system, the toolbar shown here at the top
       of the screen may or may not appear[4]. A description of the
   toolbar functions is given below:

---

[4] In earlier versions of Crystal Reports, the options to enlarge, print, email or save a report will be given at the
bottom of the screen in the form of icons. ACASA 3.0.1 uses Crystal Reports version 9 and will automatically
upgrade your version of Crystal Reports during the installation process.

i. To enlarge or minimize the report for easier viewing, click on the drop down menu next to the 100% on the toolbar and change the size of the report.

ii. To print the report, click on the "print report" icon (picture of a printer) on the toolbar. This will send the report to your network printer.

iii. To save the report to a disk or location on your hard drive, click on the "export report" icon to the right of the print icon. This will bring you to the **Export** screen:
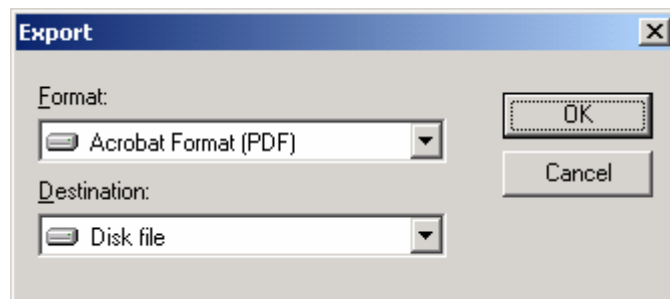

iv. Select the file format that you want to save the report in from the drop down menu under "Format:"

v. You can either save the report as a disk file or email it.

   a. To save as a disk file, select "Disk file" from the drop down menu under **Destination**.

      A. Click **OK**. This will take you to the **Export Options** screen.
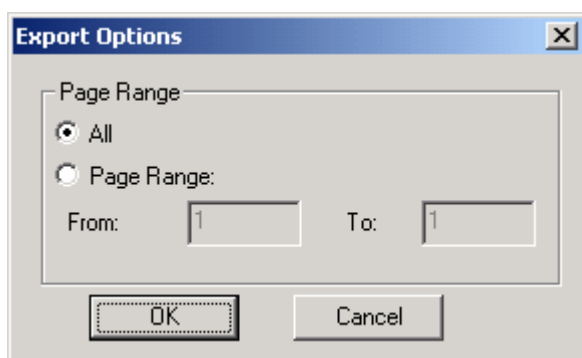
Click **OK** to print the entire report, or **Page Range** to select a particular page in the report (In this case, the report is only 1 page in length so it does not matter which option you select).
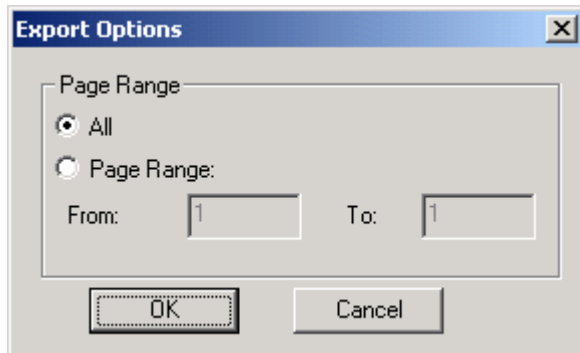
      B. Next you will come to the **Choose Export File** screen.

50
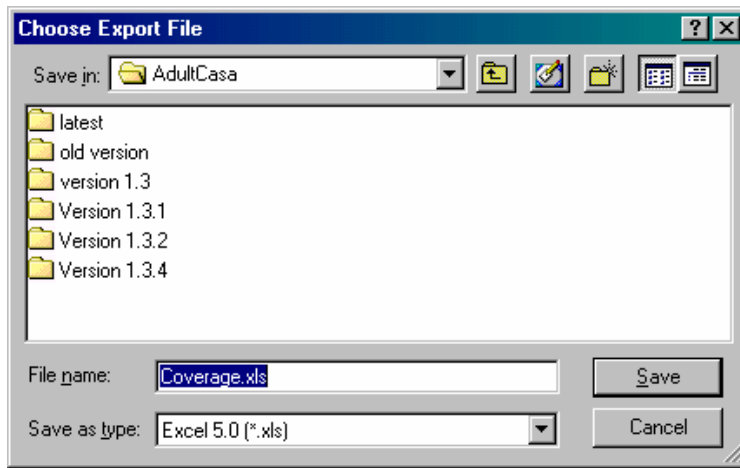
C. Select the destination for the report to save to and click **SAVE**.

b. To email the report, select "Exchange Folder" from the drop down menu under **Destination**. Click **OK**.

    i. This will take you to the **Export Options** screen.

Click **OK** to print the entire report, or **Page Range** to select a particular page in the report (In this case, the report is only 1 page in length so it does not matter which option you select).

   ii. Next you will come to the **Choose Profile** screen.
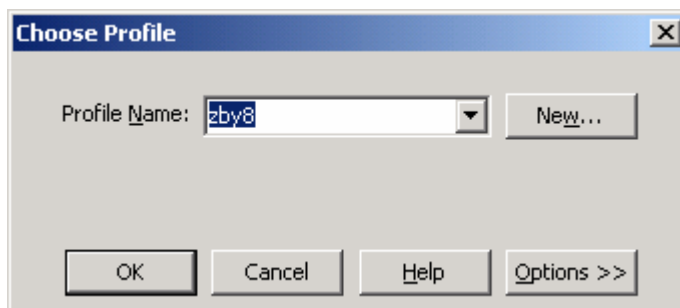
A. The profile name from your mail server account should appear in the **Profile Name**: blank. If this is the email

profile that you would like to use to send the report, click **OK**. You will come to the **Select a folder** screen, as shown on the next page.
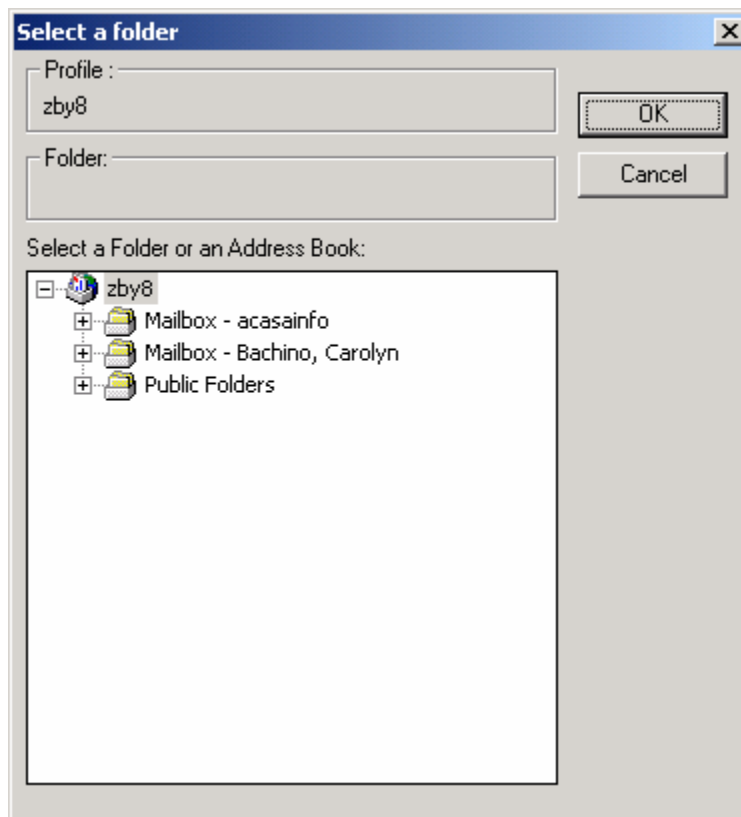
B. Select the email folder where you would like the report to be sent. If you would like to email the report to others, then send it to your inbox, as shown:
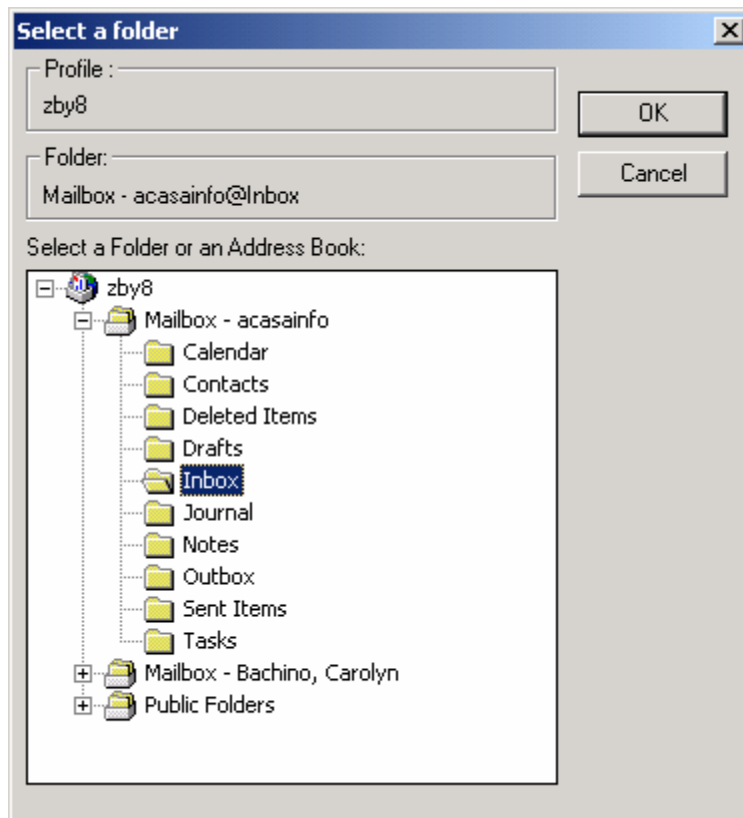
C. Open un Microsoft Outlook™, or whichever email program you use and you should see the report as an attachment in your inbox.

D. Forward the email message to whatever email address you choose to send it to.

vi. From the report screen in ACASA, click on the **X** at the top right hand corner of the screen to return to the main menu.

13.2 Generating an Adolescent Coverage Summary Report.

1. After you have selected the drop down menu titled **REPORTS** from the main menu, select **COVERAGE REPORT**. From the drop-down list that appears to the right, select **ADOLESCENT SUMMARY REPORT**. The **Select a Clinic/Provider** screen will appear.

2. Follow steps 2 through 4 under 13.1 above.

The **Adolescent Vaccination Coverage Summary Report** will look
something like this:

3.   To expand, print, or email the report, refer to section
      13.1, number 5 above.

4.   To exit the report, click the **X** at the top right hand
      corner of the screen.

13.3 Generating a Summary Report Customized by Age

1.   After you have selected the drop down menu titled **REPORTS**
      from the main menu, select **COVERAGE REPORT**. From the drop-
      down list that appears to the right, select **CUSTOM SUMMARY
      REPORT**. The **Select a Clinic/Provider** screen will appear.

2. Choose the clinic site from the drop down menu under **SELECT SITE FROM LIST**.

3. Once you have selected a site, click **CONTINUE** at the bottom of the page. You will get a screen titled **Select Ages**.

4. Type in the age range of patients you would like the report to cover. For example, if you are interested in a report of adults ages 19-29, type "19" in the first box, and "29" in the second box.

5. Click **CONTINUE** at the bottom of the screen.

6. Select the flu season start and end dates for the report as described in steps 3 through 4 under section 13.1

The **CUSTOM SUMMARY REPORT** will look something like this:

7.   To expand, print, or email the report, refer to section 13.1, number 5 above.

8.   To exit the report, click on the **X** at the top right-hand corner of the screen.

14.   Generating Demographic Summary Reports

1.   After you have selected the drop down menu titled **REPORTS** from the main menu, select **DEMOGRAPHIC REPORT**.

14.1 Generating an Adult Demographic Summary Report

1.   After you have selected **DEMOGRAPHIC REPORT** from the **REPORTS** menu, choose **ADULT SUMMARY REPORT** from the drop-down list that appears to the right.

2.   The **Select a Clinic/Provider** screen will appear.

4.   Click on **CONTINUE** at the bottom of the screen. You will be prompted to select your flu season start and end dates for the report.

5.   Enter in the appropriate dates as you learned in section 13.1 and press the **Continue** button. This will generate a report like the one you see on the next page.

Preview | X | 🖨 | 📧 | ⚡ | 100% | | 1 of 1 | | 🔍 |

powered by crystal

Adult Vaccination Demographic Summary Report

Site: ALLNUM
Location: Stone Mountain, anystate 30087
Date of Assessment: June 24, 2002
Number of Patients: 101

Method of Payment

Insurance	Total	(%)
Medicare	7	6.93
Medicaid	3	2.97
Commercial Insurance	80	79.21
Military	0	0.00
TriCare/Champus	8	7.92
State Indigent Health Plan	0	0.00
None/Self Pay	2	1.98
Other	0	0.00
Not Noted	0	0.00

Number of Patients by Race and Ethnicity

Race	Total	(%)	Total Hispanic or Latino	(%)
Black or African-American	20	19.80	0	0.00
White	22	21.78	0	0.00
Asian	0	0.00	0	0.00
American Indian or Alaska Native	0	0.00	0	0.00
Native Hawaiian or Other Pacific Islander	0	0.00	0	0.00
Other	0	0.00	0	0.00
Not Noted	59	58.42	1	0.99

Gender

Gender	Total	(%)
Male	45	44.55
Female	56	55.45
Not Noted	0	0.00

Age Group

Age	Total	(%)
19 to 64 Years	91	90.10
65+ Years	10	9.90

Reasons Not Vaccinated

Vaccine	Medical Contrain-dication Total	%	Patient Refusal Total	%	Provider Chose Not to Vaccinate Total	%	No Vaccine Total	%	Patient says Already Vaccinated Total	%	History of Disease Total	%	Allergic Total	%	Other Total	%	Unknown Total	%
Influenza Vaccine from 10/1/2001 - 2/28/2002	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	81	80
Influenza Vaccine from 10/1/2002 -	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	100	99

You can zoom, print, or export this report using the toolbar at the top of the screen, the same way as the **Coverage Summary Report** (procedures described previously in section 13.1, number 5.

6.   To exit the report, click on the **X** at the top right-hand corner of the screen.

14.2 Generating an Adolescent Demographic Summary Report

1.   After you have selected **DEMOGRAPHIC REPORT** from the drop-down list under the REPORTS menu, select **ADOLESCENT SUMMARY REPORT**.

2.   The Select a Clinic/Provider screen will appear.

3. Select the clinic site for which you would like to run the report from the drop down menu under **SELECT SITE FROM LIST:**

4. Click on **CONTINUE** at the bottom of the screen. You will be prompted to select the flu season start and end dates for the report.

5. Enter the appropriate dates and click **Continue**. This will bring you to the **Adolescent Vaccination Demographic Summary Report**.

The **Adolescent Vaccination Demographic Summary Report** will look something like this:

6. To expand, print, or email the report, refer to section 13.1, number 5 above.

7. To exit the report, click on the **X** at the top right-hand corner of the screen.

14.3 Generating a Demographic Summary Report customized by age

1. After you have selected **DEMOGRAPHIC REPORT** from the drop-down list under the REPORTS menu, select **CUSTOM SUMMARY REPORT**.

2. The Select a Clinic/Provider screen will appear.

60

3. Select the clinic site for which you would like to run the report from the drop down menu under **SELECT SITE FROM LIST:**

4. Click on **CONTINUE** at the bottom of the screen. You will get a screen titled **Select Ages**.

5. Enter the age range for the report (example 50-64 yrs of age.)

6. You will be prompted to select the flu season start and end dates for the report.

7. Enter the appropriate dates and click **Continue**.

8. To expand, print, or email the report, refer to section 13.1, number 5 above.

9. To exit the report, click on the **X** at the top right-hand corner of the screen.

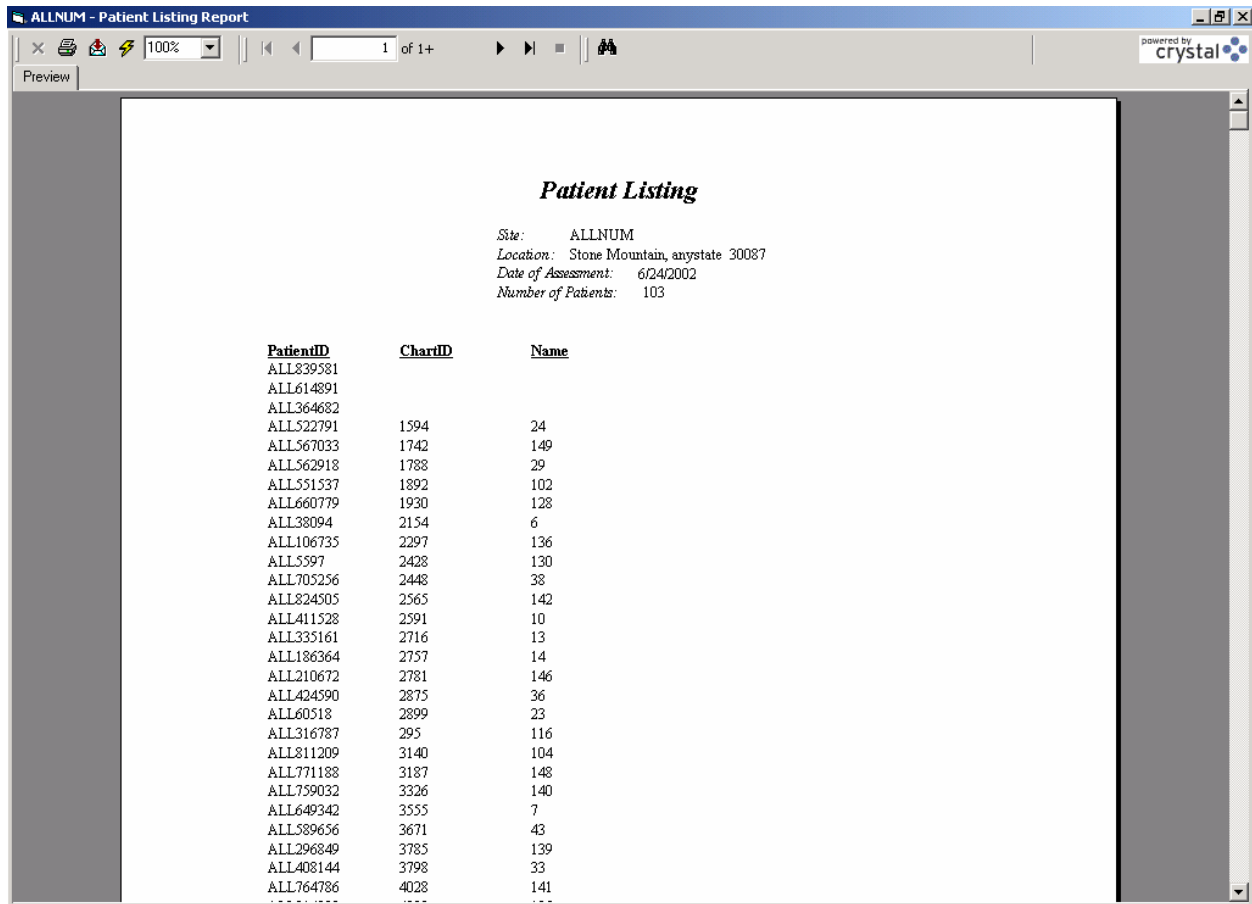The **Custom Vaccination Demographic Summary Report** will look something like this:

10. To expand, print, or email the report, refer to section 13.1, number 5 above.

11. To exit the report, click on the **X** at the top right-hand corner of the screen.

15. Generating a Provider Patient Listing Report

1. From the main menu, select the drop down menu item titled **REPORTS**, then **PROVIDER PATIENT LISTING**. The **Select a Clinic/Provider** screen will appear.
2. Select the provider for your report from the drop-down menu under "Select Site from List". Click the **CONTINUE** button.

This report was created to allow the user to quickly glance at or print out a list of which patients were entered in the chart audit.
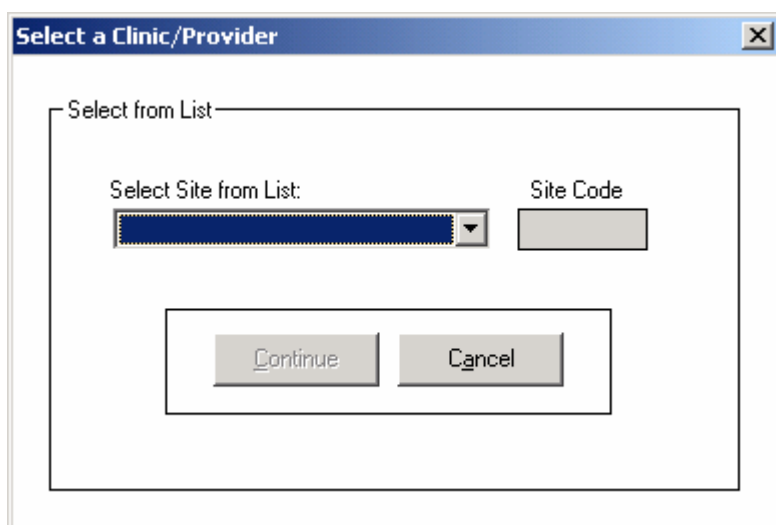
    i. You can scroll through the list of patients by holding your cursor on the scrollbar at the right-hand side of the screen.

    ii. You can zoom, print, or export this report using the toolbar at the top of the screen, the same way as described in procedure number 5 under 13.1 Generating an Adult Coverage Report.

iii. Exit the report by clicking on the **X** at the top right-hand corner of the screen.

16. Generating a Provider Patient Immunization Listing Report

The Provider Patient Immunization Listing Report is a report listing which vaccinations were received by each of the patients that were included in the assessment, along with their vaccination dates.

1. From the main menu, select the drop down menu titled **REPORTS**. Then select **PROVIDER PATIENT IMMUNIZATION LISTING**. The **Select a Clinic/Provider** screen will appear.

2. Select the provider for your report from the drop-down list underneath where it says "Select Site from List:"

3. Click **CONTINUE**. The **Provider Patient Immunization Listing Report** will look something like the sample shown on the next page.

Preview — 100% — 1 of 1+

Provider Patient Immunization L...

Site/Provider: ALLNUM
Location: Stone Mountain, anystate 3008...
Date of Assessment: 6/24/2002

Column headers: PatientID — Flu1, Flu2, Flu3, Flu4, Flu5, Pne1, Pne2, MMR1, MMR2, HepA1, HepA2, HepA3, HepB1, HepB2, HepB3, Td1, Td2, Td3, Td4, Td5, DTP1, DTP2, DTP3, DTP4, DTP5, Var1, Var2, Sma1, Sma2, Men1, Men2

Patient IDs: ALL101812, ALL105534, ALL106735, ALL107628, ALL122263, ALL122835, ALL123849, ALL138...

Values in the ALL122263 column: MMR1 2/23/81, MMR2 8/28/92, HepB1 6/4/98, HepB2 7/7/98, Td1 1/17/80, Td2 3/20/80, Td3 3/14/80, Td4 6/2/81, Td5 6/10/83, DTP1 4/14/03, Var2 4/6/03

4.   All of the patients may not be visible on one screen. To scroll through to the next and subsequent screens, click on the right arrow icon at the top of the screen.

   i. You can zoom, print, or export this report using the toolbar at the top of the screen, the same way as described in procedure number 5 under .

   ii. Exit the report by clicking on the **X** at the top right-hand corner of the screen.

17. Generating a Customized Questions Summary Report (for yes/no questions)

1. From the main menu, select the drop down menu titled **REPORTS**. Then select **YES/NO QUESTIONS REPORT**. The **Select a Clinic/Provider** screen will appear.

2. Select the clinic site from the drop-down menu as previously.

3. Click the **CONTINUE** button at the bottom of the screen. You will come to the **YES/NO QUESTIONS REPORT**. The **YES/NO QUESTIONS REPORT** will look something like this example:

4. All of the answers may not be visible on one screen. Hold your cursor on the scrollbar to the right of the report to scroll to the bottom of the report.

    i. You can zoom, print, or export this report using the toolbar at the top of the screen, the same way as described in procedure number 5 under 13.1 Generating an Adult Coverage Report.

    ii. Exit the report by clicking on the **X** at the top right hand corner of the screen.

18. Generating a Customized Questions Summary Report (for fill-in-the-blank questions)

1. From the main menu, select the drop down menu titled **REPORTS**. Then select **FILL-IN-THE-BLANK QUESTIONS REPORT**. The **Select a Clinic/Provider** screen will appear.

2. Select the clinic site from the drop-down menu as previously.

3. Click the **CONTINUE** button at the bottom of the screen. You will come to the **FILL-IN-THE-BLANK QUESTIONS REPORT**. The report looks something like the example shown on the next page.
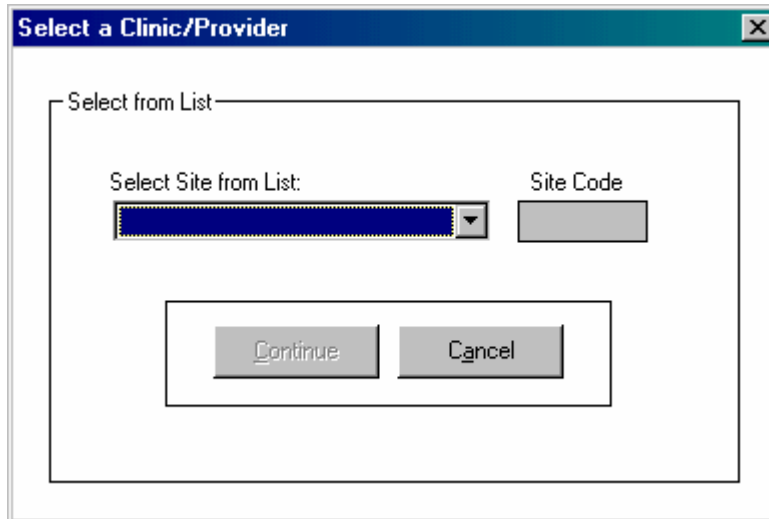
Site: ALLNUM
Location: Stone Mountain, anystate 30087
Date of Assessment: June 24, 2002
Number of Patients: 103

Question #1:   How did the patient feel yesterday?
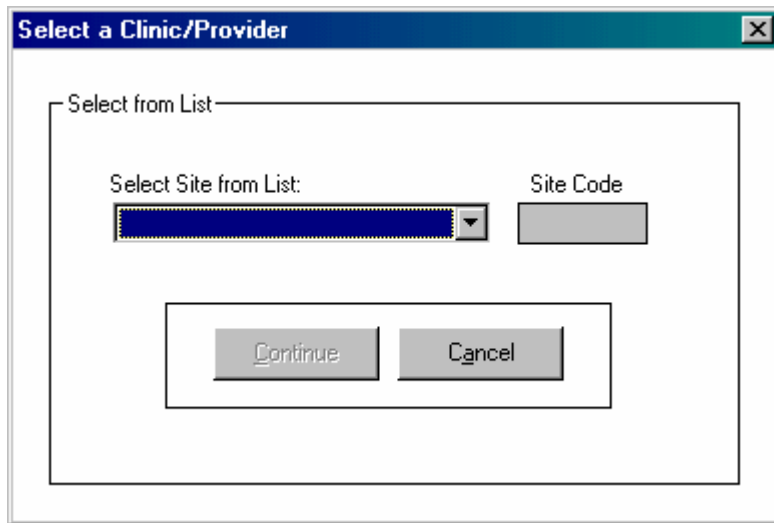
PatientID	ChartID	Name	Response
ALL101812	8357	108	
ALL105534	8240	113	
ALL106735	2297	136	
ALL107628	89	112	
ALL122263	7917	22	
ALL122855	8342	49	
ALL123849	5016	106	Subreport:QFTSub1.rpt
ALL138091	7319	126	
ALL142790	6024	137	
ALL162852	8024	9	
ALL176263	7952	143	
ALL186364	2757	14	
ALL190096	5159	11	
ALL207905	4929	132	
ALL210672	2781	146	
ALL210923	6082	42	
ALL221762	7102	2	
ALL244220	6147	107	
ALL284746	4823	110	
ALL296849	3785	139	
ALL316787	295	116	
ALL317986	7101	19	
ALL335161	2716	13	
ALL367889	7657	125	
ALL38094	2154	6	
ALL391762	5479	131	
ALL394142	7793	1	
ALL408144	3798	33	
ALL408802	6652	41	
ALL410904	4456	127	
ALL411528	2591	10	

i.   All of the answers (even to the first question) may not be visible on one screen. Hold your cursor on the scrollbar to the right of the report to scroll to the bottom of the report.

ii.   All of the patients will not be visible on one screen. To scroll through to the next and subsequent screens, click on the right arrow icon at the top of the screen.

iii. You can zoom, print, or export this report using the toolbar at the top of the screen, the same way as described in procedure number 5 under 13.1 Generating an Adult Coverage Report.

iv.   Exit the report by clicking on the **X** at the top right hand corner of the screen.

68

19. Generating a Notes Report

1.   From the main menu, select the drop down menu titled
      REPORTS. Then select **NOTES REPORT**. The **Select a
      Clinic/Provider** screen will appear.

2. Select the clinic site from the drop-down menu as previously.

3. Click the **CONTINUE** button at the bottom of the screen. You
will come to the **NOTES REPORT**, which will look something like the
report on the next page.

```
Preview
```

Patient Notes for
ALLNUM
Stone Mountain, anystate 30087

PatientID	Patient Name	Chart Number	Notes
ALL38094	6,	2154	Patient allergic to tetanus
ALL394142	1,	7793	alksjfklja
			asdjf2
			3.
			4.5lkajslkf
			ajkla;ej
ALL565745	150,	8375	had mumps
ALL724650	120,	7	had measles and mumps as a child
ALL983487	4,	7834	Hep B series (1995-1996)

NotesReport.Notes (String)

i.   All of the patient notes may not be visible on one screen. Hold your cursor on the scrollbar to the right of the report to scroll to the bottom of the report.

ii. You can zoom, print, or export this report using the toolbar at the top of the screen, the same way as described in procedure number 5 under <u>13.1 Generating an Adult Coverage Report</u>.

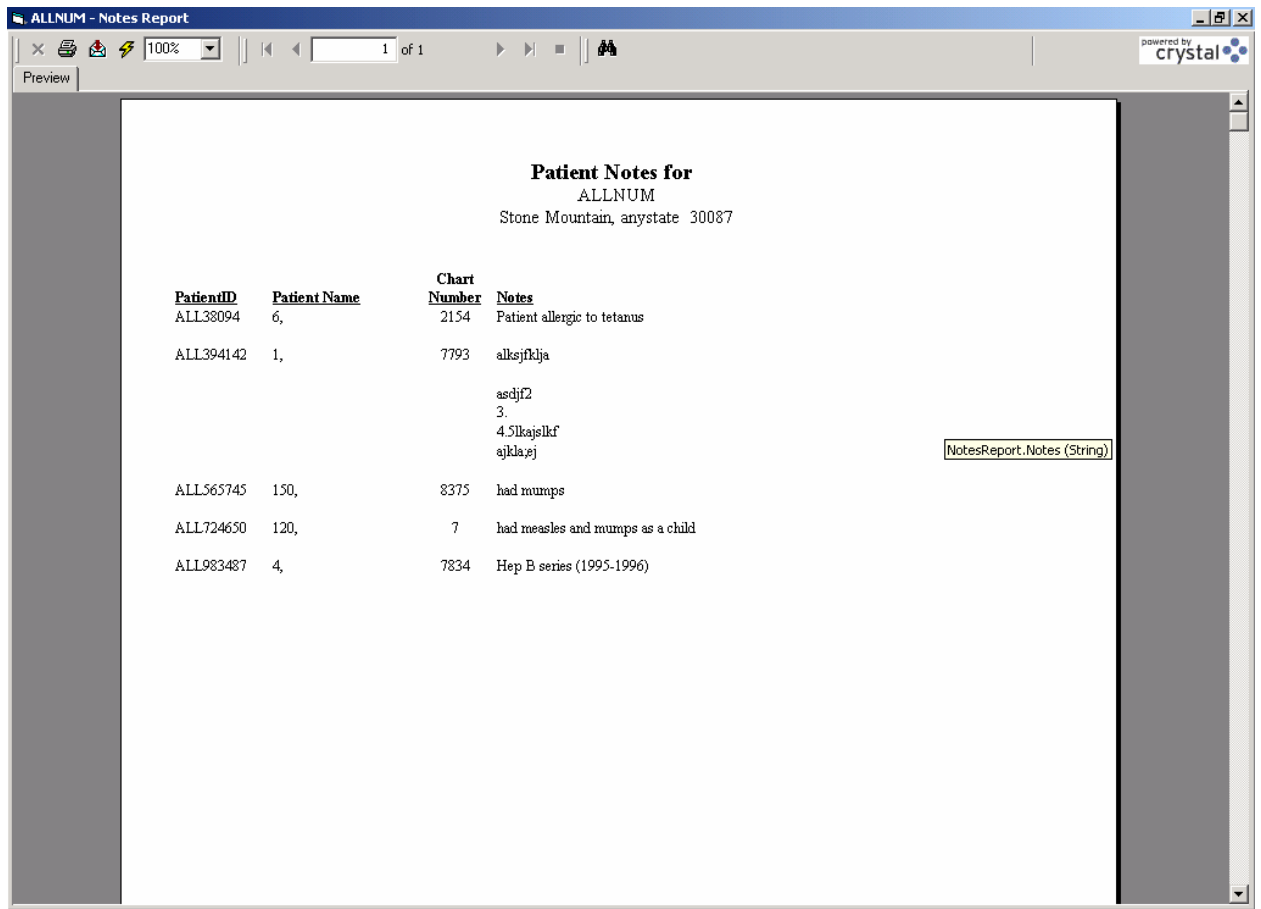iii. Exit the report by clicking on the **X** at the top right-hand corner of the screen.

20. Generating a Patient Immunization Card

A patient immunization card is a report of an individual patient's vaccinations and what vaccinations they needed. This ideally can be printed out and placed in an individual patient's chart to remind the clinic staff of what vaccinations a patient has received and may still need.

1. From the main menu, select the drop down menu titled **REPORTS**. Then select **PATIENT IMMUNIZATION CARD**. The **Select a Patient** screen will appear.

2. Select the clinic site from the drop-down menu under where it says "Select a Site:"

3.   Once you have selected the clinic site, select the patient
       for whom you wish to produce an immunization card, as shown
       below:

4.   Click the **CONTINUE** button at the bottom of the screen. You
       will come to the **PATIENT IMMUNIZATION CARD**, which will look
       something like the example on the next page.

Preview

Immunization Record

Name: GNS, GRR
Birthdate June 25, 1980

	At risk	Type of Vaccine	Date given mo/day/yr
Hep B			
Hep A			
MMR			
Varicella			
Td			
Pneumococcal		PCV	9/3/2003
Influenza	✔		

i. You can zoom, print, or export this report using the toolbar at the top of the screen, the same way as described in procedure number 5 under 13.1 Generating an Adult Coverage Report.

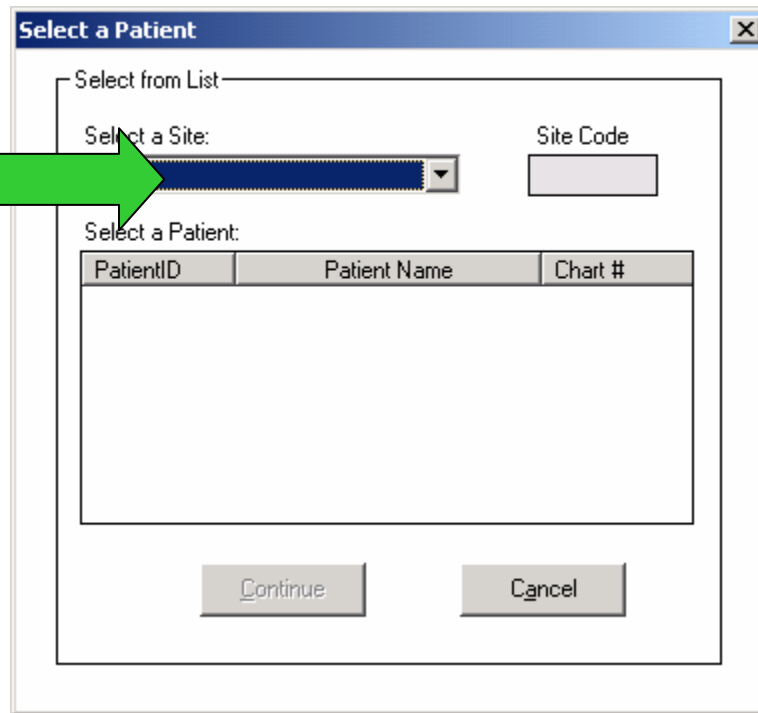ii. Exit the report by clicking on the **X** at the top right-hand corner of the screen.

21. Utilities

1. From the **Main Menu**, select the drop down menu titled **UTILITY**.
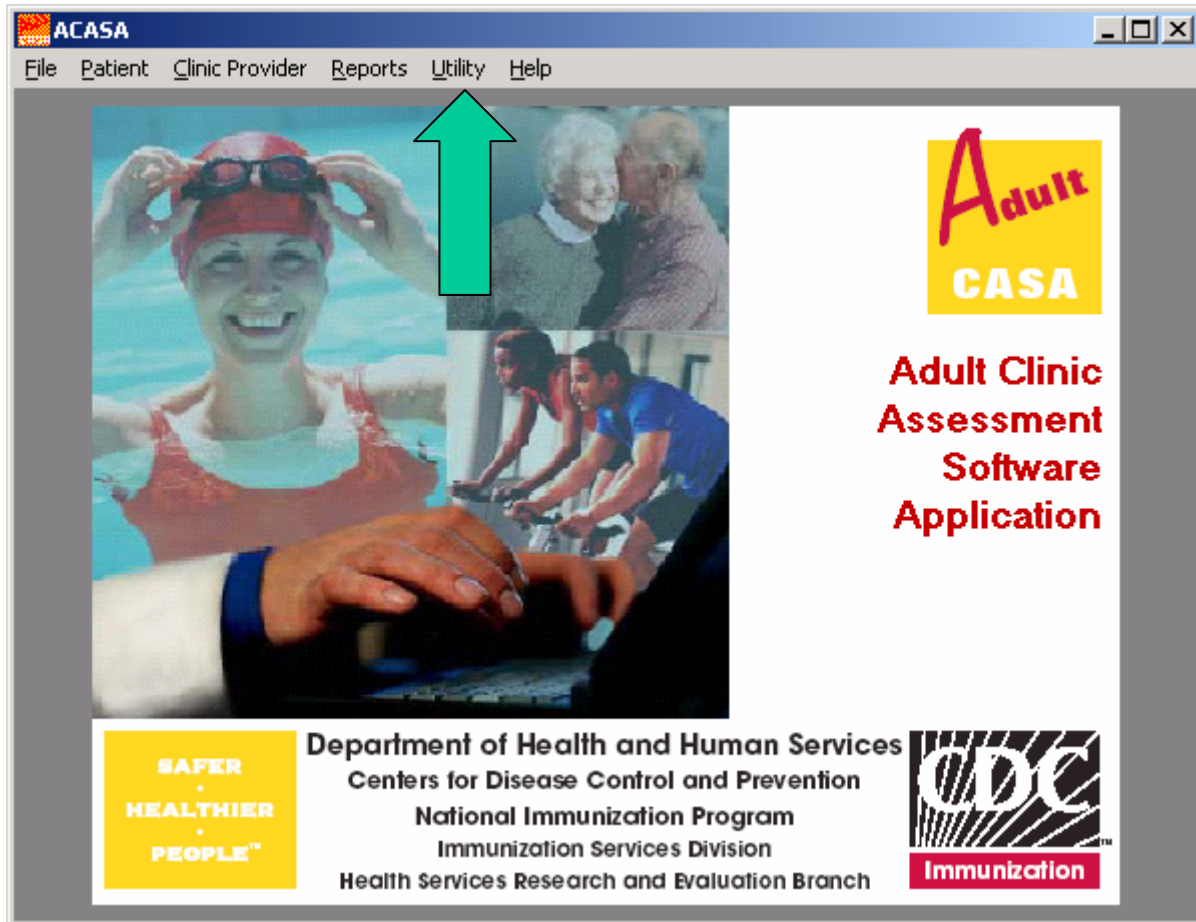
(The current Adult CASA Version 3.0.1 has three utilities (Export Site(s), Import Site(s) and Compact Database).

21.2 Exporting Data

1. Once you have selected the **UTILITY** drop down from the main menu, select "Export Site(s)". The **Select Site** screen will appear.
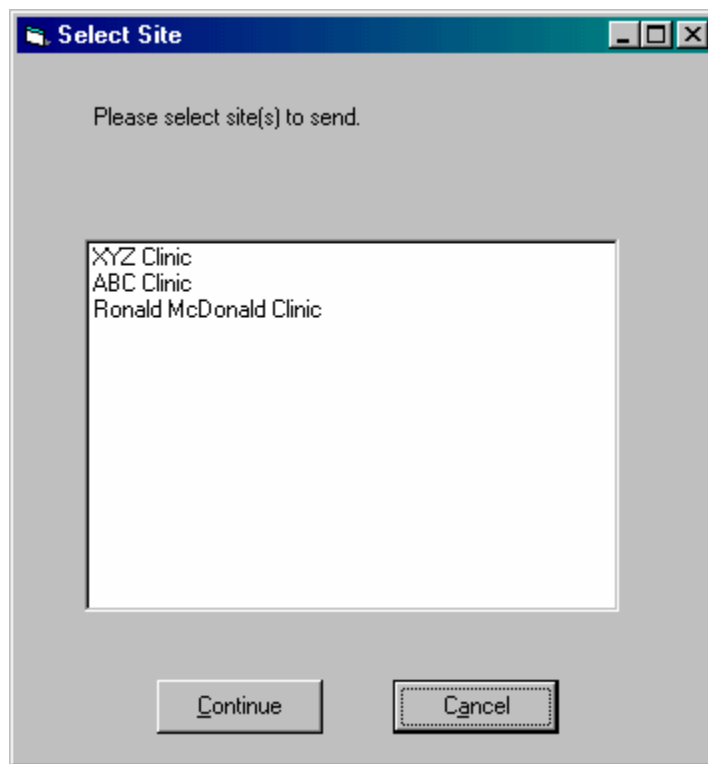
2. Select the clinic site or sites from which you are exporting data. (To select more than one site, hold the shift or control key on your keyboard and select the sites you want to export.)

3. Click **Continue**.

4. This brings you to a screen that looks like this:
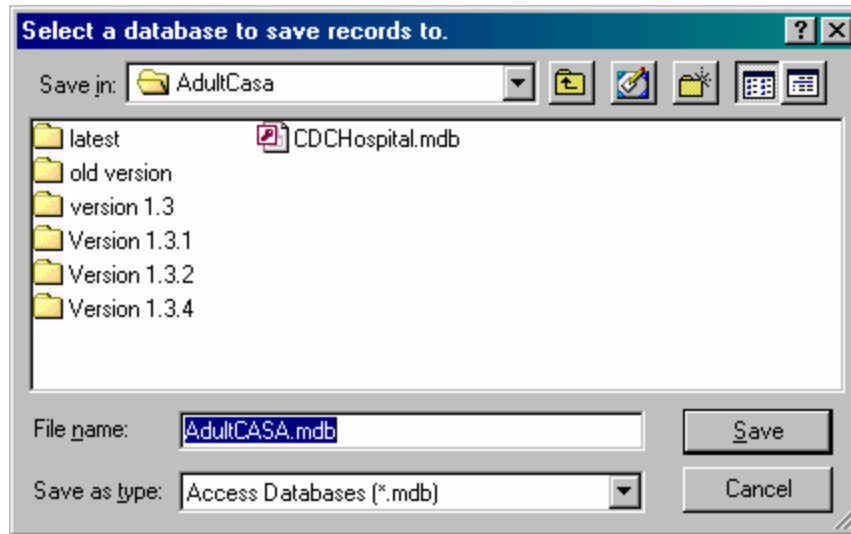
5. Select an Access database to export your site into or save your database under a new name. You can either overwrite an existing file or merge your site into it. The next screen you will come to will look like this:
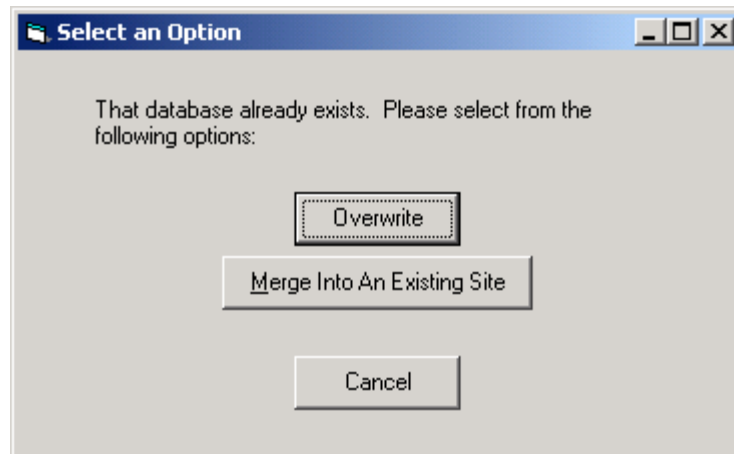
   i. If you wish to overwrite an existing file, select the **OVERWRITE** button. **Clicking OVERWRITE will cause the existing database to be completely overwritten with the new file!** If this is not what you want to do, then click **CANCEL or rename the file**!

6. You will get a message letting you know that your records have been successfully saved, as shown on the next page.
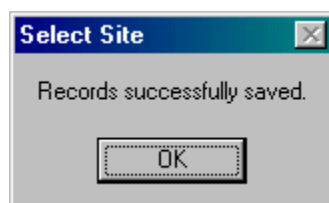
Your records will be saved in the location where you
exported them.

    i. If you wish to merge the site into an existing
       database, select **MERGE INTO AN EXISTING SITE.**
       This will combine the records you are exporting
       with those in an existing site that you choose.

       *Note: You can only export a site into a site that
       was created with ACASA version 3.0 or later.
       Therefore, it is important to upgrade to the latest
       version of ACASA. If you try to merge the site
       with a site that was created using an earlier
       version than 3.0, you will get an error message
       that looks like this:*
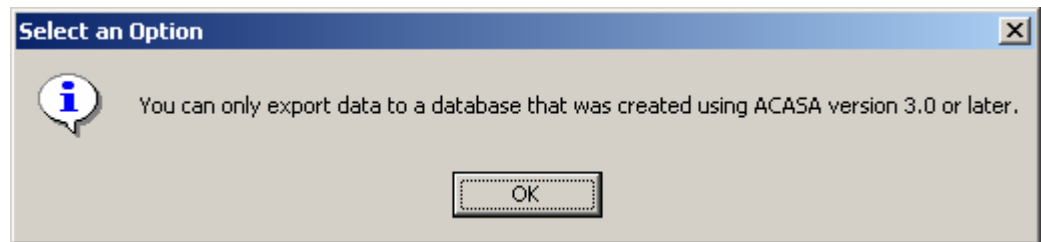
       Click **OK** to cancel this request.

    ii. Next, you will come to the **Site Merge** screen,
       which will look something like this:

7. Choose the clinic site from the database you selected that you would like to merge your records with by clicking on the site name.

8. Click the **Merge Records** button.
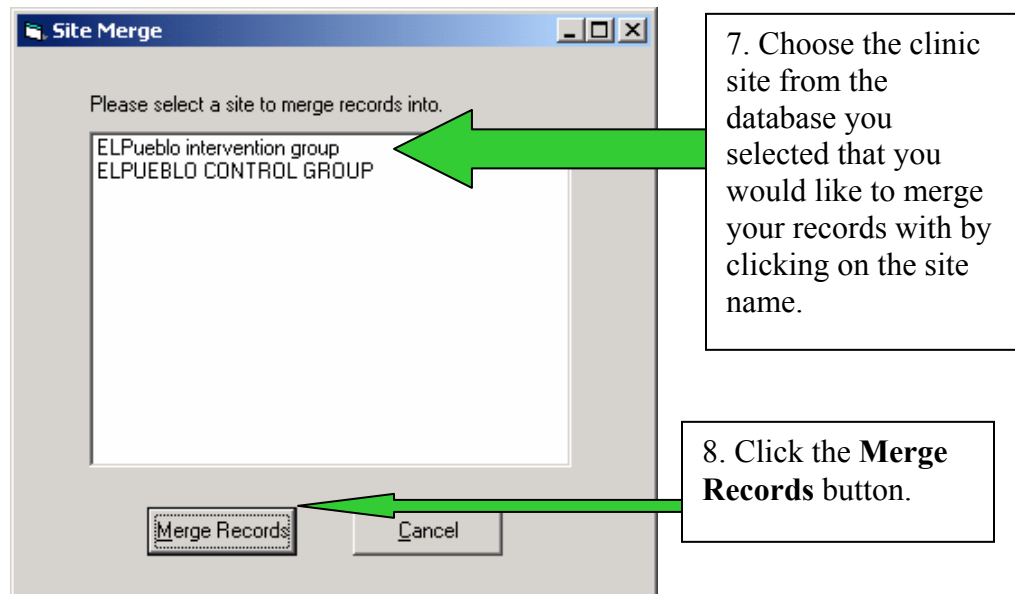
*Note: If the custom questions that correspond to the site
you are merging your records into are different from the
custom questions for your site, then you will get the
following warning message:*
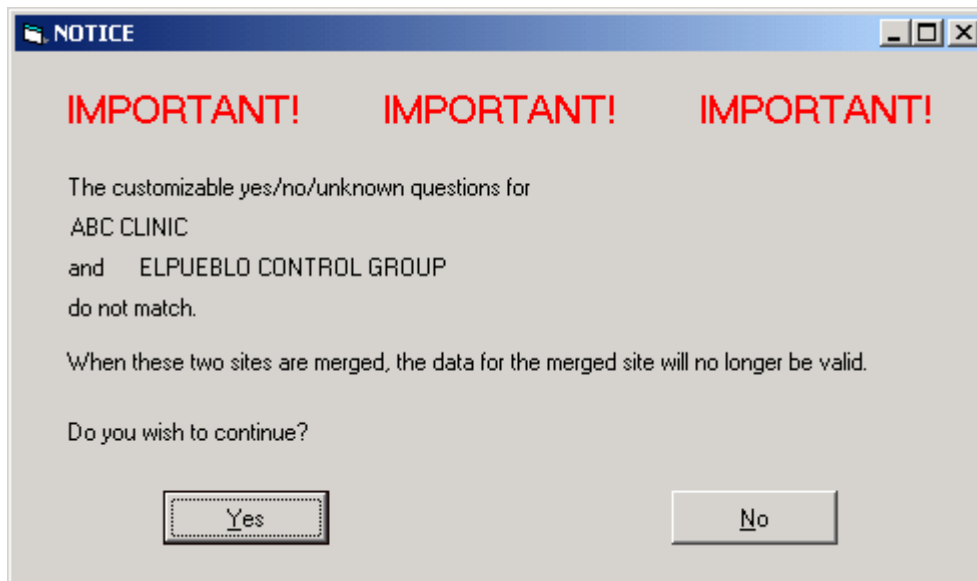
This error message lets you know that the custom questions data will not be maintained in the merged site once it is created. By clicking **YES** you are accepting that the custom questions data will be lost. Otherwise, you can choose to click **NO** and retype the custom questions in your site to exactly match those in the site you are exporting your records into (or vice-versa). Doing this properly may involve some instruction by CDC staff. You may email this question to acasainfo@cdc.gov for help.

If you choose YES, once the sites are merged, you will get a confirmation message that looks like this:
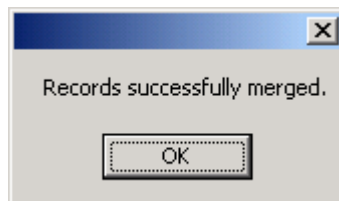
Click **OK** to return to the **Main Menu**.

21.2 Importing Data

You can use the importing feature in ACASA to either import data from another ACASA file or to import a file containing the customization (including user-pre-defined custom questions) that you want to re-use from a previous assessment, as described in the section of this manual titled 4. Adding Additional Questions.

1. Once you have selected the **UTILITY** drop down from the main menu, select "Import Site(s)". The following screen will appear:
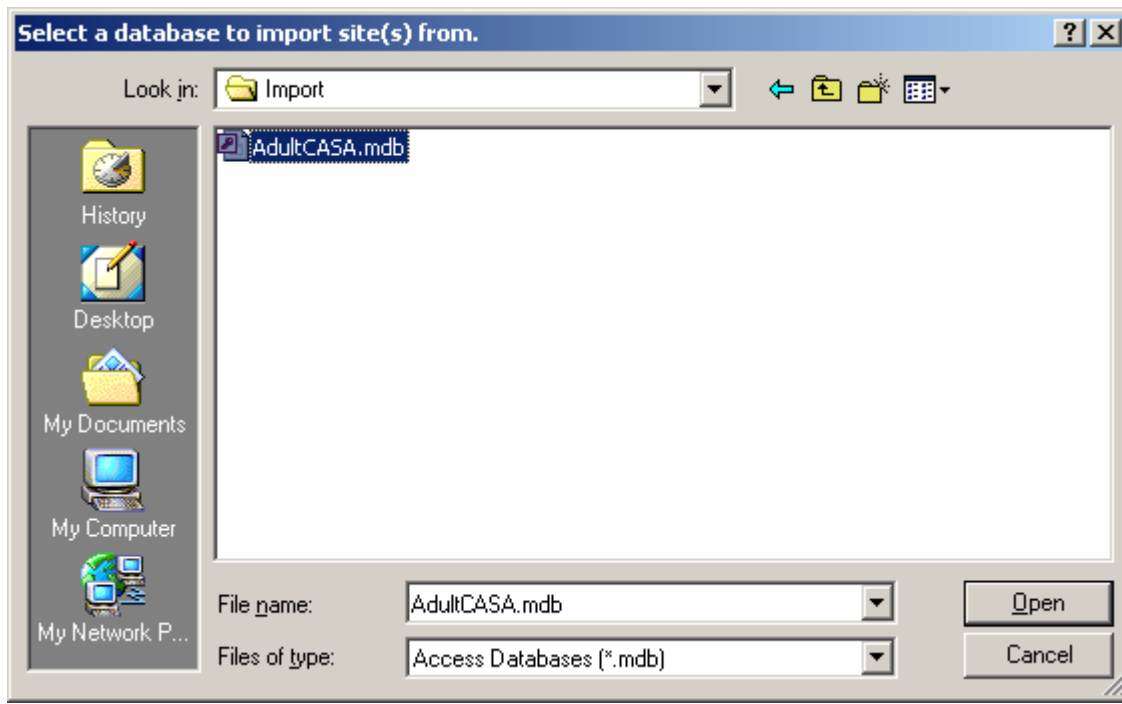
2. Select a database to import sites from. If you saved a dummy customization file while following section 4 of this manual, go to the location/folder on your hard-drive or back-up drive where that file is saved:

3. Put your cursor here and change the file name to match the name of the file you're importing. In this example, Custom.mdb
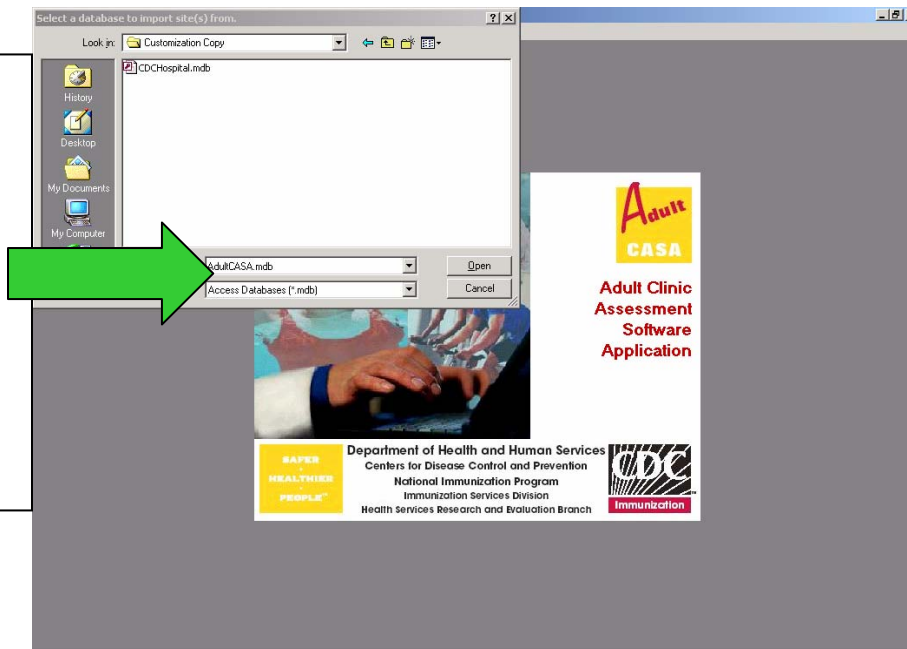
4. Click on the **OPEN** button. The **Select Site(s)** screen will appear.
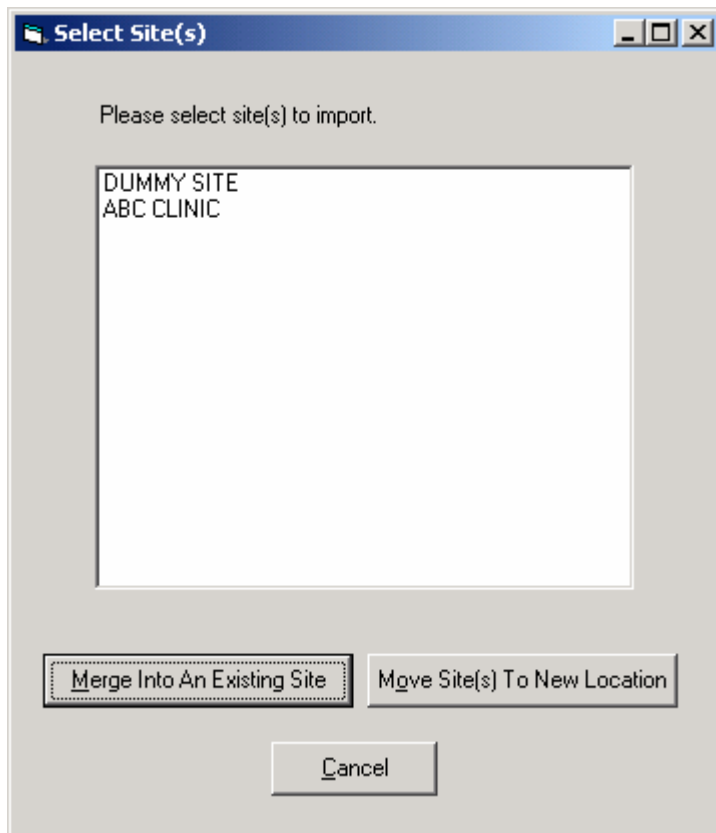
5. You can either merge the data from the database you
    selected in step 2 into an existing site that you have
    already created, or you can create a site with a new
    name to merge the records into.

    *Note: If you are importing a customized database rather
    than actual data, you want to create a new site, so you
    would not select the **Merge into An Existing Site** button.
    If so, skip to ii below.*

    i. To merge the data from the selected database,
        select the site you wish to import from the list
        of sites in the white area of your screen.

        1. Click on **Merge into an Existing Site**. The
           Site Merge screen will appear.
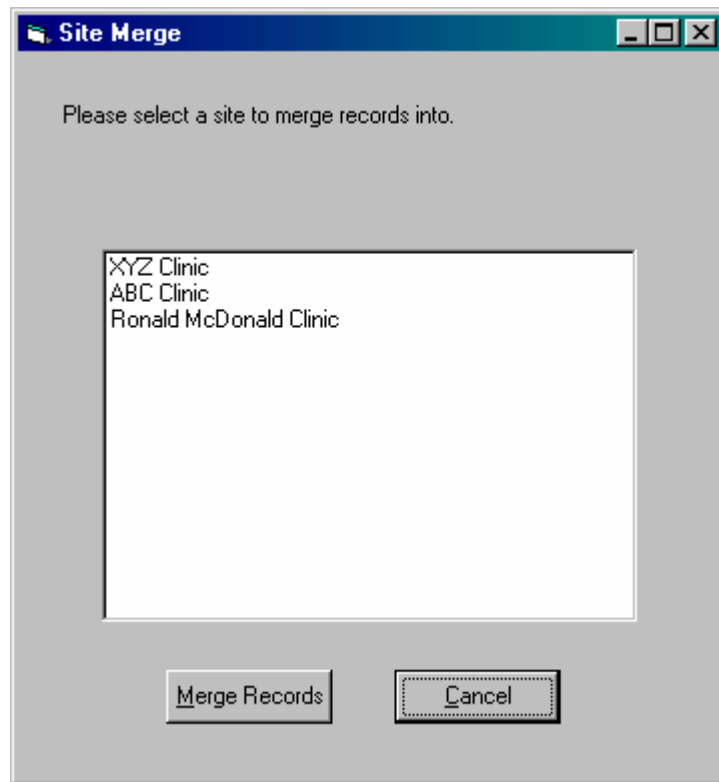
2. Select the clinic site that you wish to import records into.

3. Select the **Merge Records** button. You will get a message letting you know that your records have been successfully imported.

4. Click on **OK** to return to the main menu.

ii. To create a site with a new name to merge the records into, follow steps 1 through 3 above until you get to the **Select Site(s)** screen.

iii. From the **Select Site(s)** screen, select the site to import records from.

iv. Select **Move Site(s) to New Location**.

Note: *If there is already a site saved in your system by the same name as the site you are importing, you will get a warning message that looks like this:*
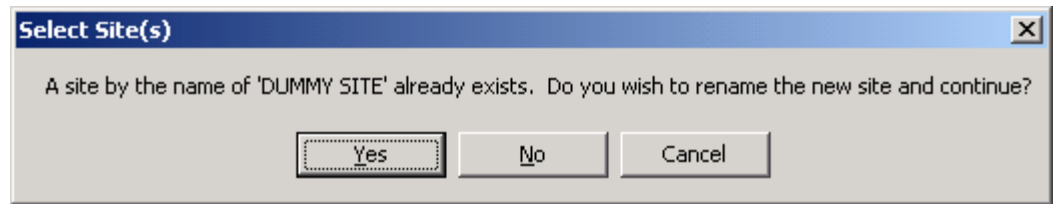
Selecting **NO** will bring you back to the main menu and cancel the merge.

1. Select **YES** and continue. You will get a screen that looks like this:
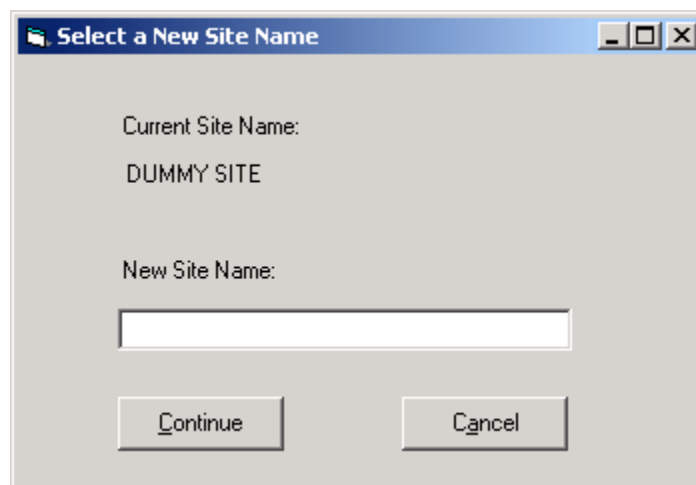
2. Enter the name for the new site. For example, let's call the new site "Dr. Levitt".

3. Click **Continue**. You will get a screen that looks like this, letting you know that the site was added:
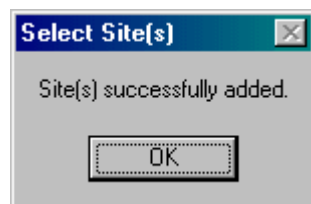
4. Click **OK**.

If you imported the new site in order to keep the customization that was established during a previous site assessment, then an additional step is required. <u>You must go into that site and change the site provider information so that it matches the actual site of your current assessment</u>. Refer to the section in this manual titled <u>Editing Clinic Provider Information</u>.

21.2 Compacting the Database

You may want to compact the data if you have a large file and wish to send it to someone as an attachment, save it to a floppy disk, or to save space on your computer's hard drive. To do this:

1.   Select the "Utility" drop down menu from the main menu.
      Select "Compact Database". The database will automatically
      be compacted.
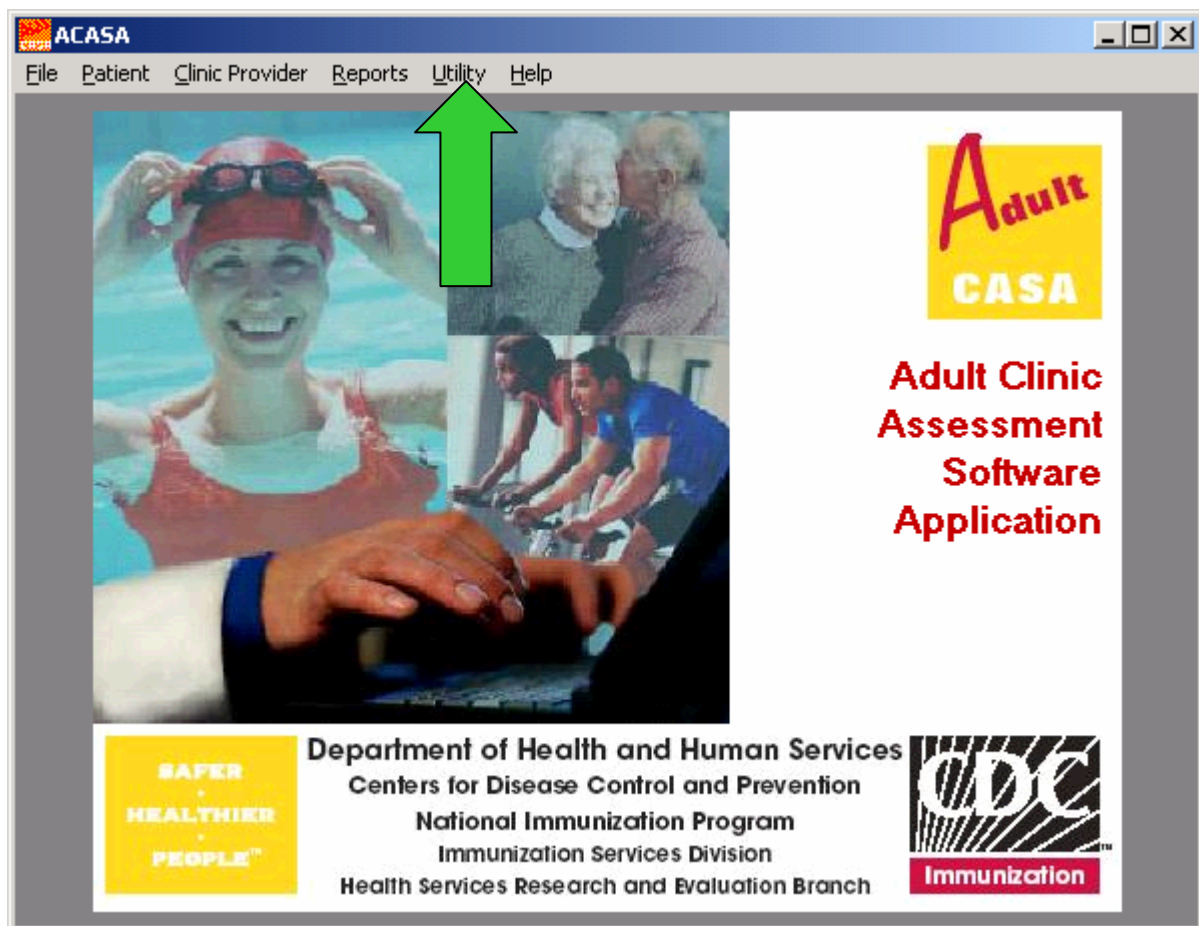
2.   Under the "Utility" menu, select "Compact Database". The
      data will be automatically compacted.

22. Backing Up Your Data

ACASA data is backed up automatically by Microsoft Access™. However, there are certain instances when you will need to make additional backups of data. These are:

- Immediately following an assessment site visit
- When uninstalling and reinstalling software.

1. Immediately following an assessment site visit, you should save your data to a floppy, writeable CD-Rom or zip disc.

   a. If you have an external drive, ensure that it has been properly attached to your laptop prior to beginning the site visit and that there is a zip disk or CD-Rom inside.

   b. Save the data selecting the **Utility** drop-down menu from the **ACASA MAIN MENU**.

   c. Select **Export Site(s)** from the drop-down menu.

23.   Help Menu Options

The **Help** menu, which is located on the Main Menu, is currently not able to list options for help topic. If you select "Contents" under the drop down menu "Help", you will get a message that looks like this:
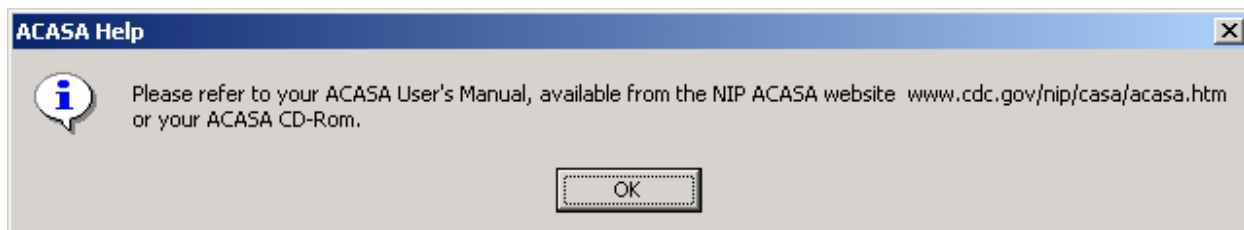
Note: Use the Table of Contents in this user's manual to access the specific topics you are looking for. You can go to a particular section in this user's manual by clicking on the section heading in the Table of Contents.

General information about the software version you have and how to reach technical support can be accessed by selecting "About Adult CASA" under the **Help** drop-down menu. By selecting this option, you will see a screen that looks like this:
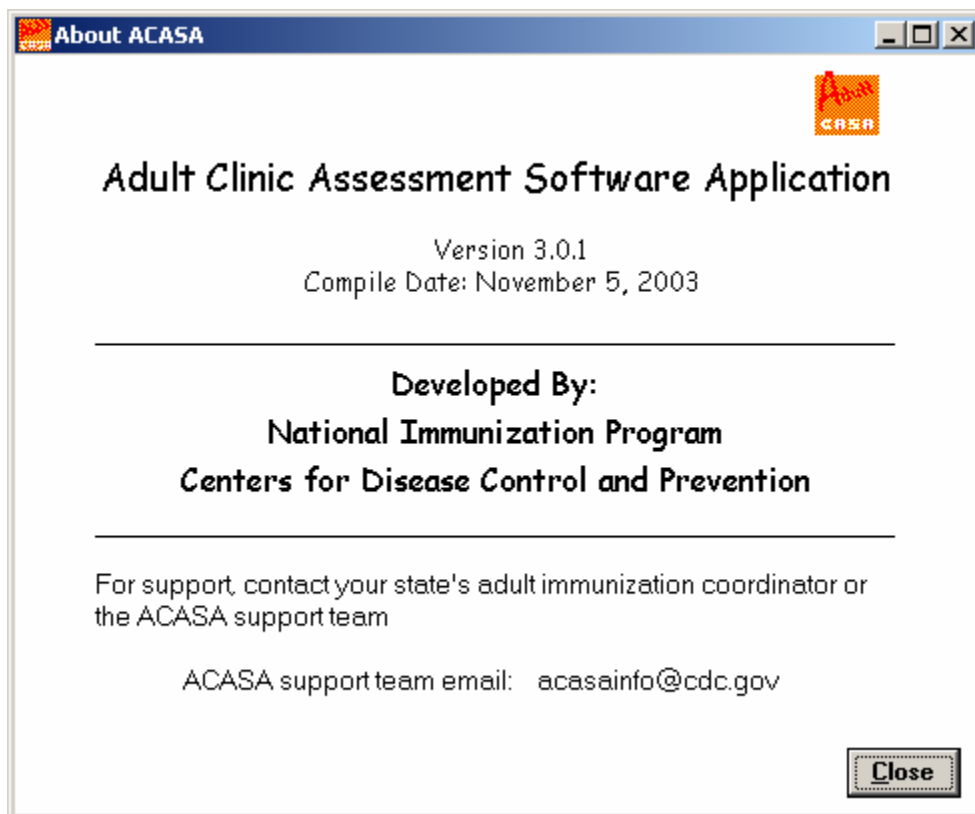
24.   Quality Assurance Procedures

CDC strongly recommends that following procedures be followed to ensure proper data entry:

1.   From the main menu, select the **PATIENT** drop-down menu.
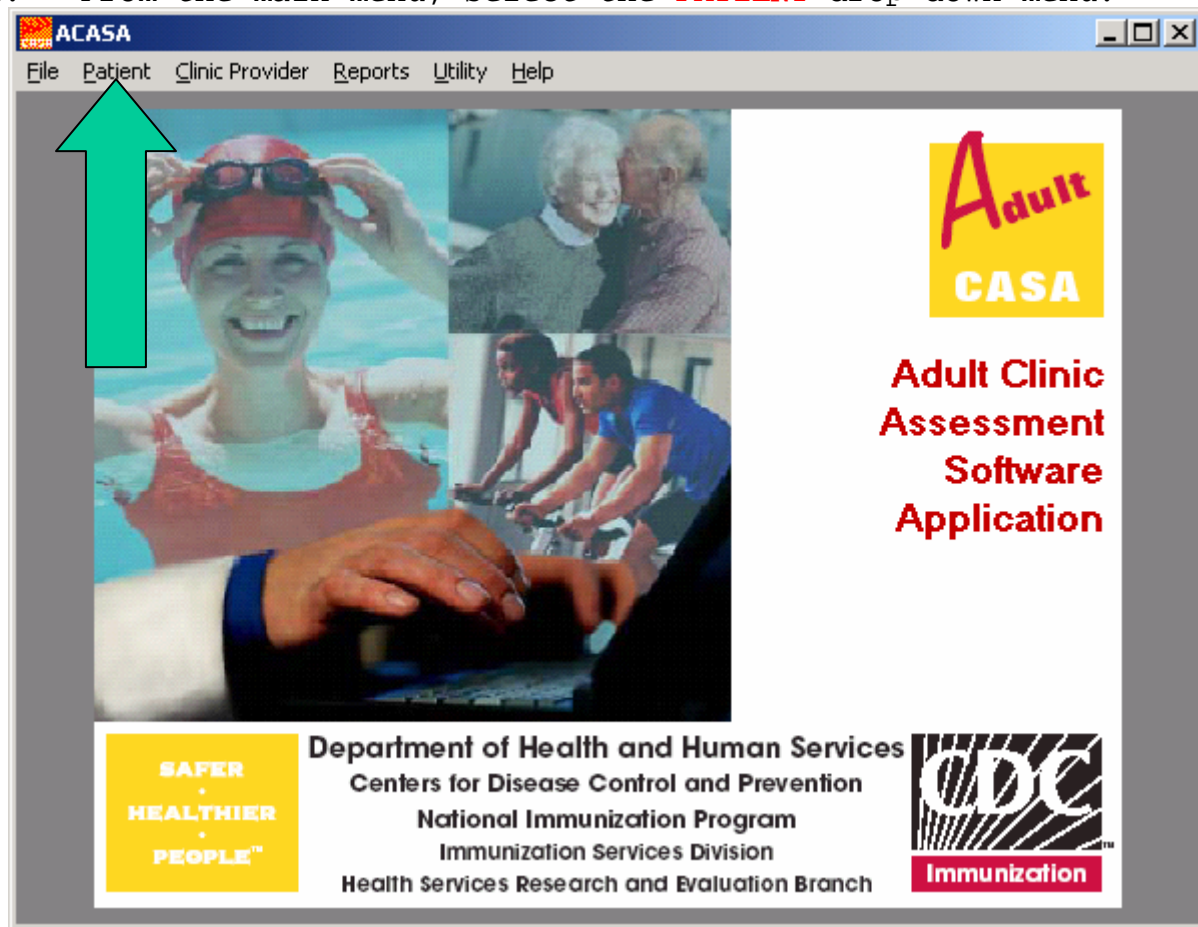
2.   Next, select the **PATIENT LISTING** subheading. The **Patient History** screen will appear.

Once you have selected the clinic site, a list of all patients you entered will appear in the **PATIENT HISTORY** box.

5.   Place your cursor somewhere within the white areas inside the box.

6.   Once your cursor appears, scroll to the right. Scroll to the right until you see the heading **BirthDate**.

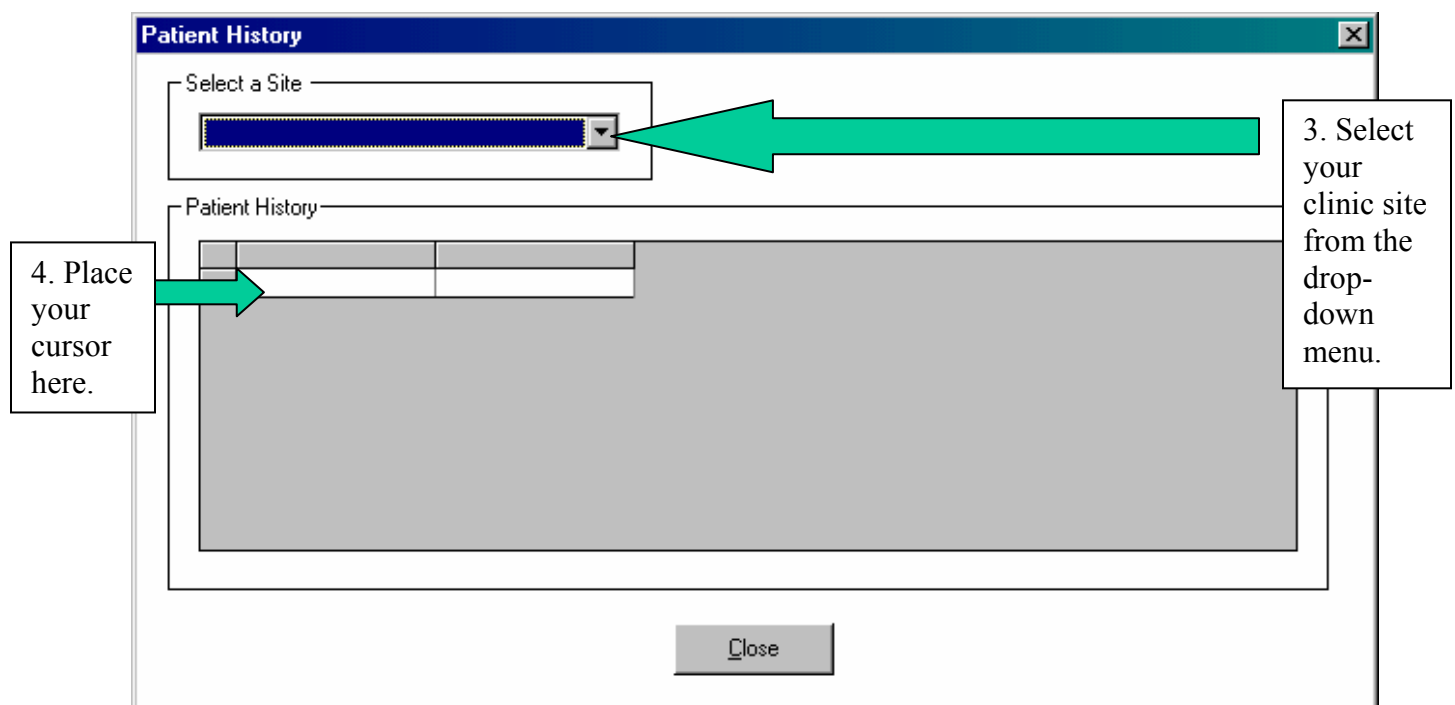7.   When your cursor is in the "birth date" field, scroll all the way down through your list of patients entered. If a birth date is missing for a patient, that patient will not be included in the coverage report!

8.   If birth dates are missing, make a note of this and edit your patient following the procedures described in section 9, **Updating Information on a Patient**.

9.   If you customized your data entry to record first and/or last visit dates, scroll down again through your list of patients. For patients with missing visit dates, go back to the medical record to find this information and edit your patient following the procedures described in section 9, **Updating Information on a Patient**.

10.   Click **CLOSE** when you are finished reviewing your patient information.

25.   Accessing the Database

All data recorded into ACASA is automatically saved into a Microsoft Access™ database on your computer's hard-drive.

Access to this database should be limited by the database administrator in order to avoid corruption of the data.

Being able to access the data directly is an important feature of ACASA because it enables the user to run queries which are otherwise not available in the ACASA program. For instance, the user may want to create a listing of all patients in a particular age-group who are missing vaccinations, in order to give this information to the provider practice. Since a compiled report of all patients at-risk for and missing particular vaccinations does not currently exist, the user will need to make a copy of the database and access that copy of the database directly to get at this information. The user can do this by selecting "Save As…" from the "File" menu and saving the copy of the database to a directory other than where the program file are installed. That way there is less risk of corrupting the original data set.

Tables that contain relevant data for running queries, such as the one described in the paragraph above include:

- **AntigenInfo table**: Contains what antigens were given to each patient, vaccination dates, and reasons not vaccinated.
- **PatientInfo table**: Contains patient demographic information (identifies what patient corresponds to the PatientId numbers in the other tables).
- **NotesInfo table**: Contains the individual patient notes that were entered during the site visit.
- **QuestionInfo table**: Contains the data for the yes/no questions that were entered about each patient during the site visit.
- **QuestionTextInfo table**: Contains the data for the fill-in-the-blank questions that were entered about each patient during the site visit.
- **RiskFactorInfo table**: Contains the data on patients' medical, social and behavioral risk factors that was entered during the assessment.
- **SiteInfo table**: Contains the information about each site for which there has been data recorded.

To run a query, the user should be familiar with using this feature in Microsoft ACCESS™. If you know that you will need to run additional queries with the data on the day of the assessment to share with a clinic provider site, it is advisable that you practice running the query you need prior to going in to do the actual assessment.

Steps to take in creating a query to determine patients in particular age or risk groups missing specific vaccinations may include:

- Creating relationships among tables (i.e. PatientInfo table, AntigenInfo table and RiskFactorInfo table).

- Running a Simple Query Wizard and selecting the appropriate fields from each table above (i.e. charted, BirthDate, Antigen, Vaccination date (VacDate), any risk factors of interest).

- Sorting the query data by BirthDate if interested in a particular age group (ex. 50+ for missing influenza vaccinations).

- Copying the data onto another spreadsheet program like Microsoft Excel to edit until you have identified the data you need.

*Note: If there is no date in the VacDate field for a
particular vaccination for a particular patient, then you
can assume that no vaccination was given.*

26.   How to Report Software Problems

Please report all technical difficulties to acasainfo@cdc.gov.
Include a brief description of your problem/question and your
telephone number if you wish to be contacted by phone. We will
respond to your request as soon as we can.